Infor SyteLine Quality Control Solution (QCS) Manual

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Quality Control Solution (QCS) Manual

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QCS Setup Section

QCS Setup Overview

The Quality Control Solution (QCS) modules allow SyteLine users to track Quality information for parts in their Item Master file. QCS allows users to comply with sections of the ISO 9001 Quality Systems Model.

- QCS Supplier is used to track Quality information for purchased items.
- QCS In Process is used to track Quality information for manufactured items.
- QCS Customer is used to track Quality information for items being shipped to and returned from customers.
- QCS Enterprise is used to track Quality information for quality activities throughout the business enterprise that are not directly linked to a material (item).

NOTE: Only items, vendors, jobs and customers that exist in SyteLine are tracked through QCS.

All QCS access is via Infor SyteLine 9.00 for QCS 9.00. Standard forms, navigation, functionality and terminology from SyteLine are used.

A number of files and parameters are used to fine-tune QCS to your needs. This section of the manual introduces you to what is required for each module (Supplier, In Process and Customer), and provides detailed information for each step.

QCS 9.00 Installation Guide

Installation Procedure

1) **Prerequisites**
   You must be running SyteLine 9.00 or higher to use this software.

2) **Uninstall previous versions of QCS**
   If you are currently running an older version of QCS, you must uninstall it from the control panel on the Utility server.

3) **Install the QCS image**
   If you are using the ISO image, you will first need to extract it. Run the setup.exe file to install QCS on your utility server.

4) **Apply QCS to Databases**
   Run Start>All Programs>RSVP>QCS> QCS Configuration Wizard from the **Start Menu**.

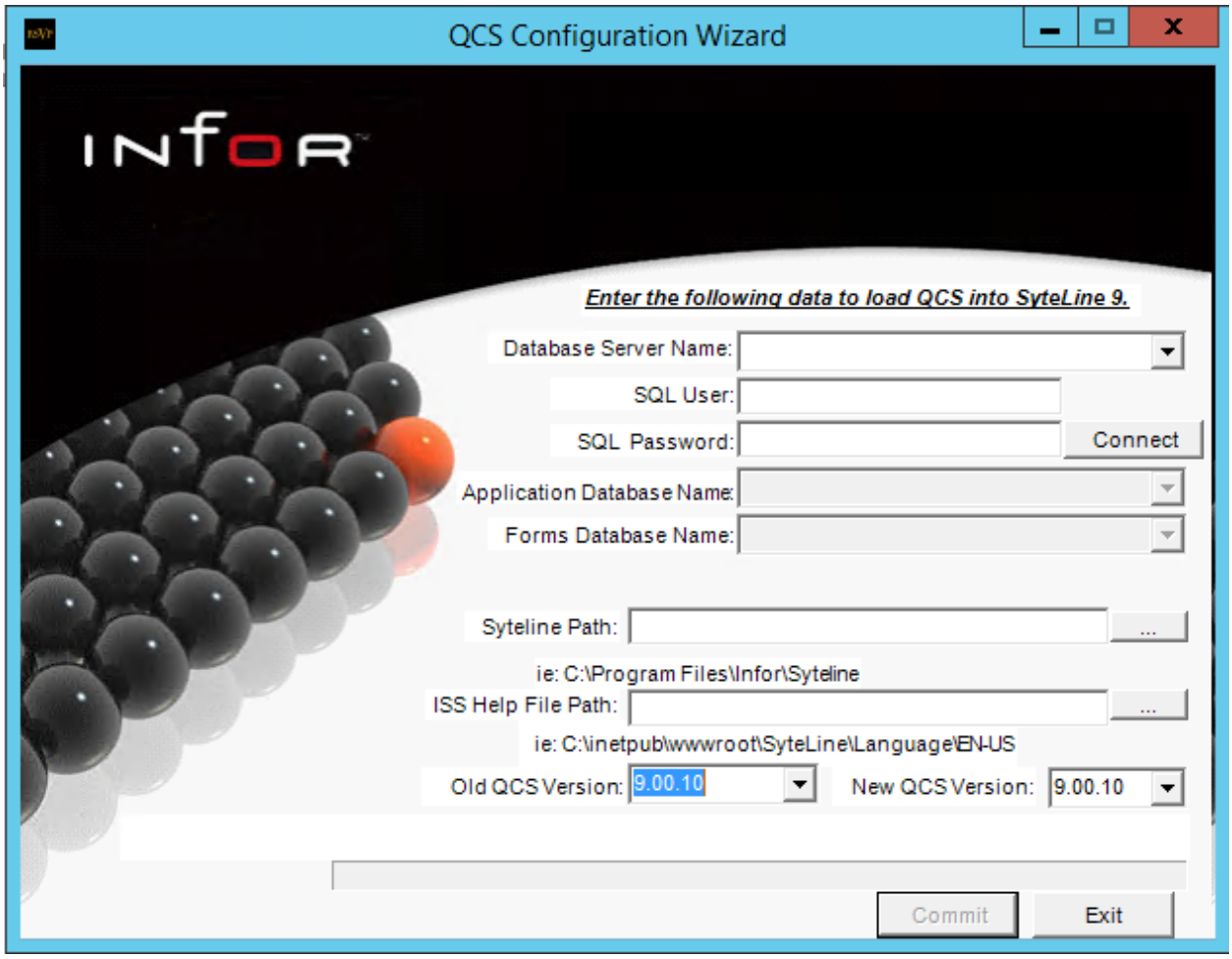
QCS Configuration Wizard

DESCRIPTION: This wizard is used to complete the installation and the configuration of QCS with your SyteLine database(s).

Field Descriptions:

- **Database Server Name:** Name of the Database Server that contains the SyteLine databases.
- **SQL User:** Name of the SQL user used to connect to SQL
- **SQL Password:** Password for the SQL user connecting to the database server.
- **Connect Button:** Opens a data connection to the SQL server.
- **Application Database Name:** The application database you are applying QCS to.

- **Forms Database Name:** The forms database you are applying QCS to.
- **SyteLine Path:** This is the location of the SyteLine Reports folder.
- **ISS Help File Path:** This is the location of the SyteLine Help Files.
- **Old QCS Version:** If performing a new installation, choose "New Installation" in the **Old QCS Version** field. If upgrading from a previous version of QCS, select your current version in the **Old QCS Version** field.
- **New QCS Version:** Leave the default value of 9.00.10.
- **Commit Button:** Will run the QCS Configuration Wizard against the specified databases and file locations.
- **Exit Button:** Exits the Wizard with no changes applied to the system. If you are installing QCS after a new site is added to an existing multisite DB, or for some reason is reloading QCS 9.00.10 (installing 9.00.10 when 9.00.10 is already installed), you must choose this option when running the installer.

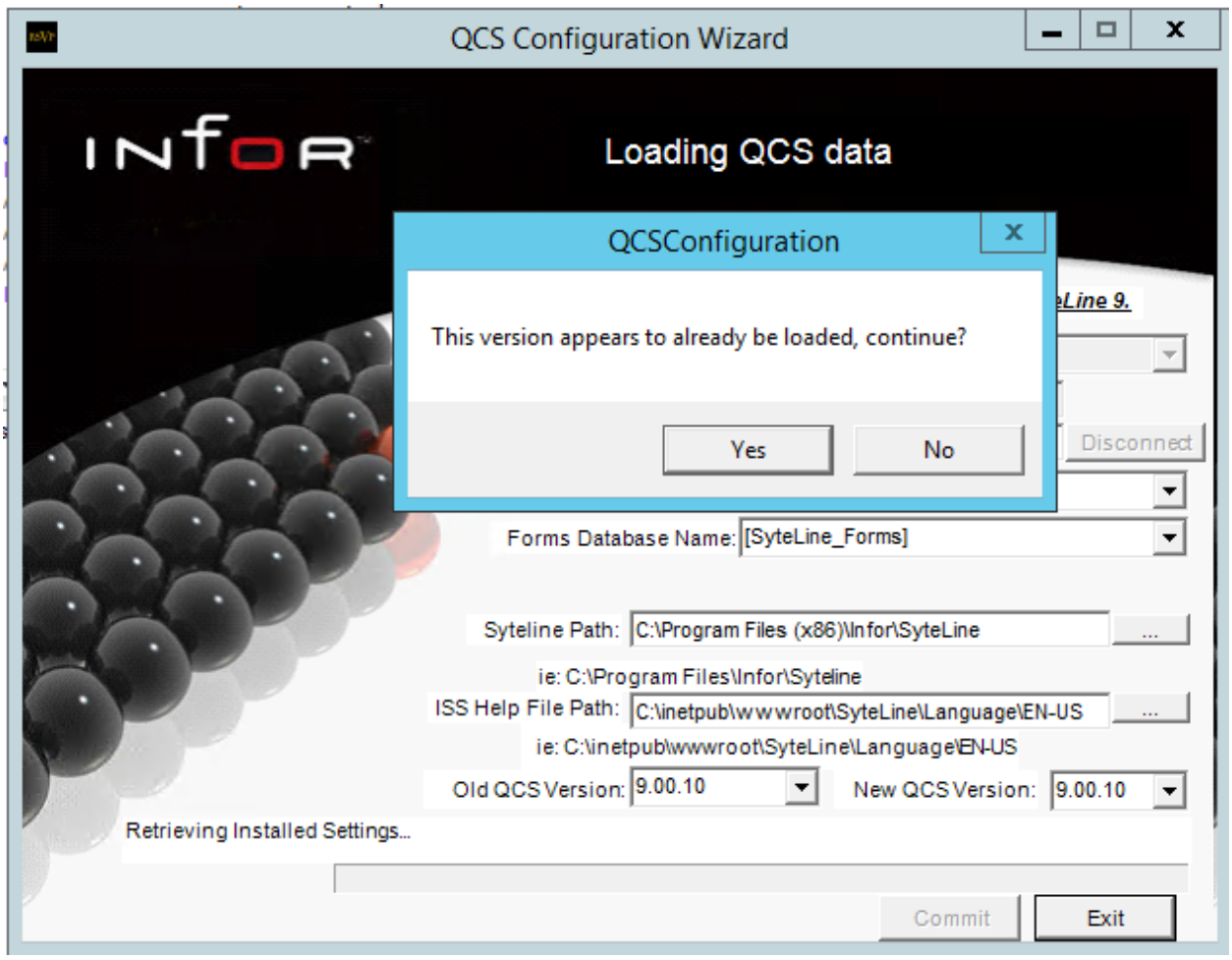


Note: if QCS 9.00.00 is previously installed on a database that already has two or more sites, the upgrade to 9.00.10 will truncate the QCS tables since the current QCS data is invalid.

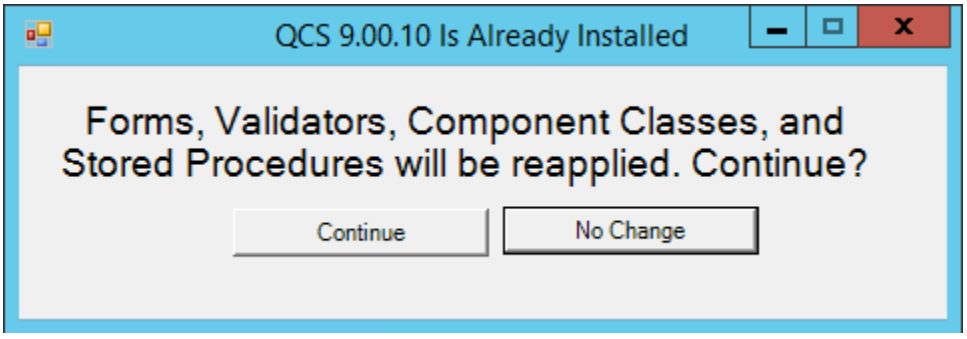
If you have multiple single site databases, and you want to merge them into an empty database, you must:

1) Install QCS into the empty database.
2) Install QCS into the single sites before merging the databases, or the schema will be mismatched and the merge will fail. Or, you can wait until you merge the sites and then install QCS once the sites are merged.

3) If QCS 9.00.10 is already installed and you run the wizard again, you are presented with this option:



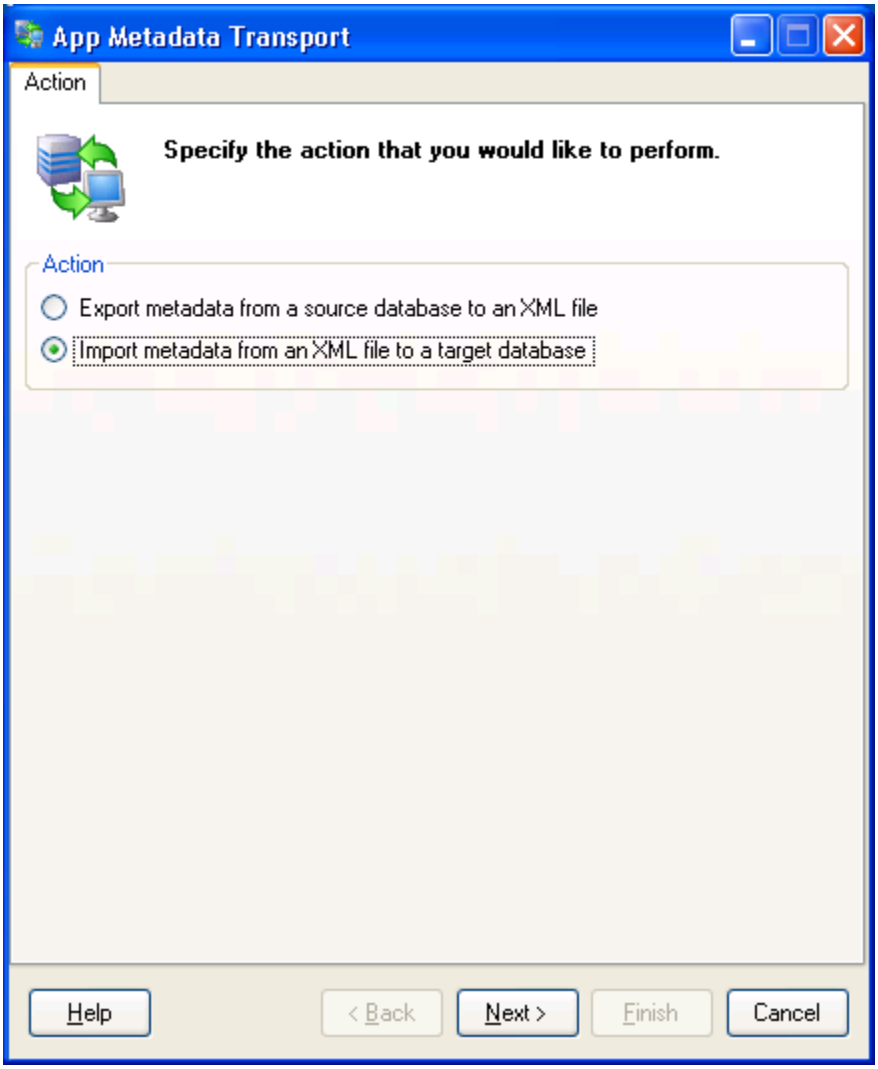
4) If you click **Yes**, this message is displayed:



If you click **Continue**, forms, validators, component classes, and stored procedures are reapplied. If you click **No Change**, the wizard will close.

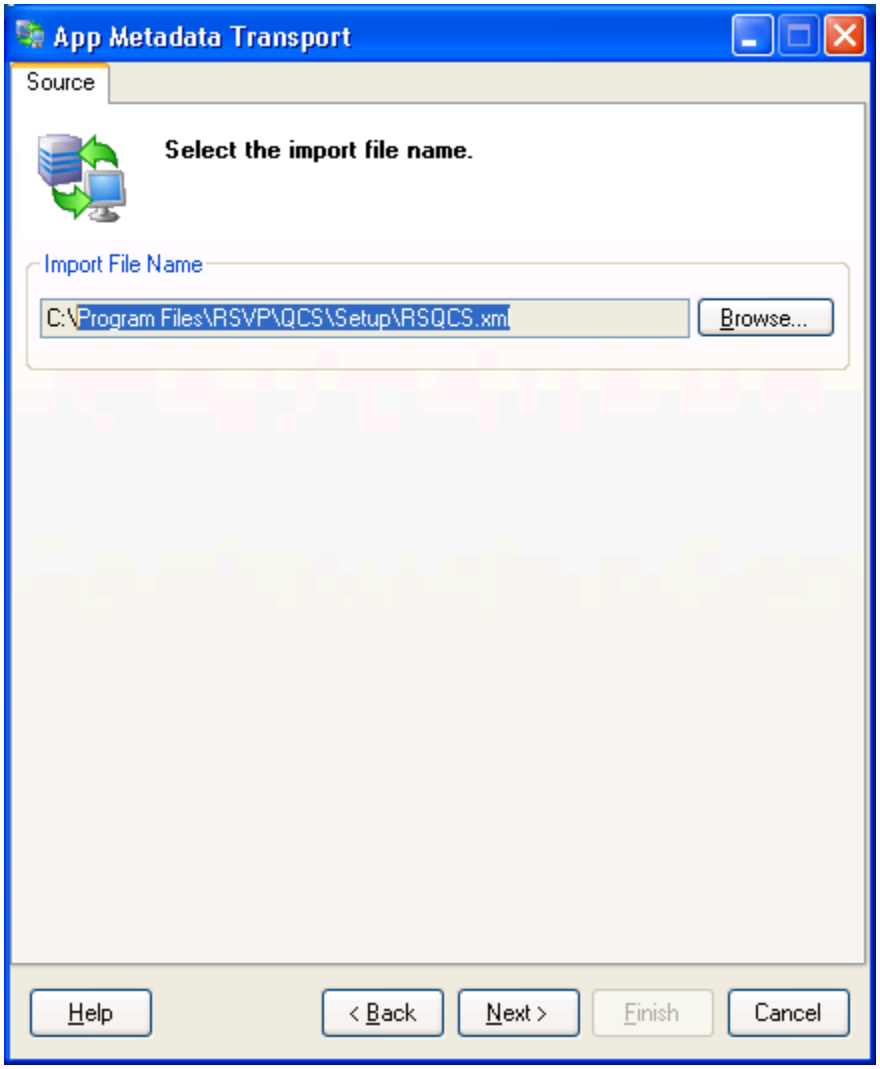
5) Load the IDO Metadata and Event Handlers

a. Launch the Application Metadata Transport Utility. It is located here - **Program Files (x86)\Infor\SyteLine\AppMetadataTransport.exe**



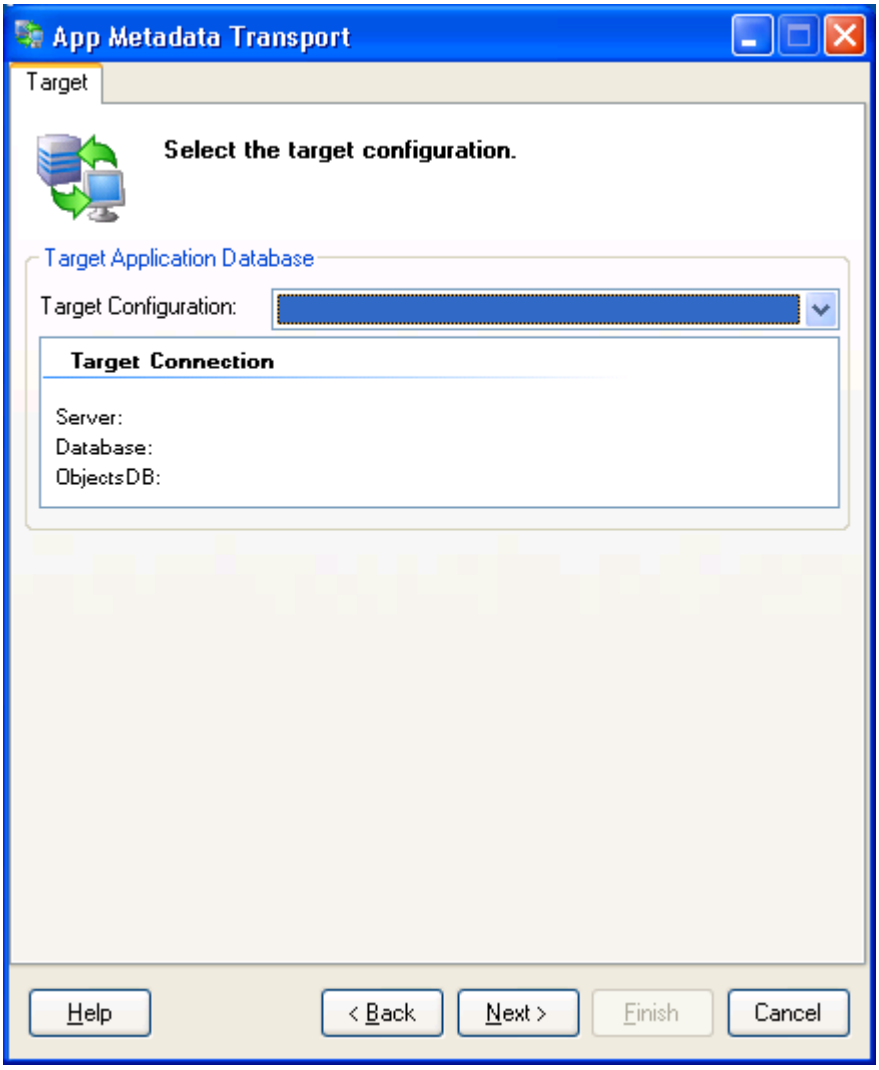
b. Choose the import option.

c. Click **Next**.



d. Browse to the QCS metadata file and click next. It is located here - **Program Files\RSVP\QCS\Setup\RSQCS.xml**

e. Click **Next**.



f. Choose your Syteline configuration from the Target Configuration dropdown list.

g. The QCS IDOs are all be selected by default. Click **Next** through the property class and custom assembly screens as QCS does not have any. In the Event System Metadata and Event Handlers screens, **choose Import radio button select (RSQCS)** from the dropdown list. Click through the rest of the prompts until you can click the finish button.

h. Stop and restart your Infor IDO Runtime Service for the QCS Metadata to take effect.

i. Open the Event Global Constants form.

j. Create these entries and set the value to the email or email group you wish to receive QCS emails:
QCSCAREmail
QCSCCREmail
QCSCMREmail
QCSChangeEmail

QCSMRREmail
QCSTRREmail
QCSTopicEmail
QCSVRMAEmail

k. Make sure the email parameters are turned on in the QCS General Parameters form, and that the Syteline Event handler system and email setup is according to Syteline instructions.

6) Deploying the reports (Infor SyteLine 9.00 only)

SyteLine 9.00 users will need to deploy the SSRS (SQL Server Reporting Services) reports. The QCS installation will place the reports in the SyteLine\Report\Reports folder. However, these reports need to be published to the report server in order to function.

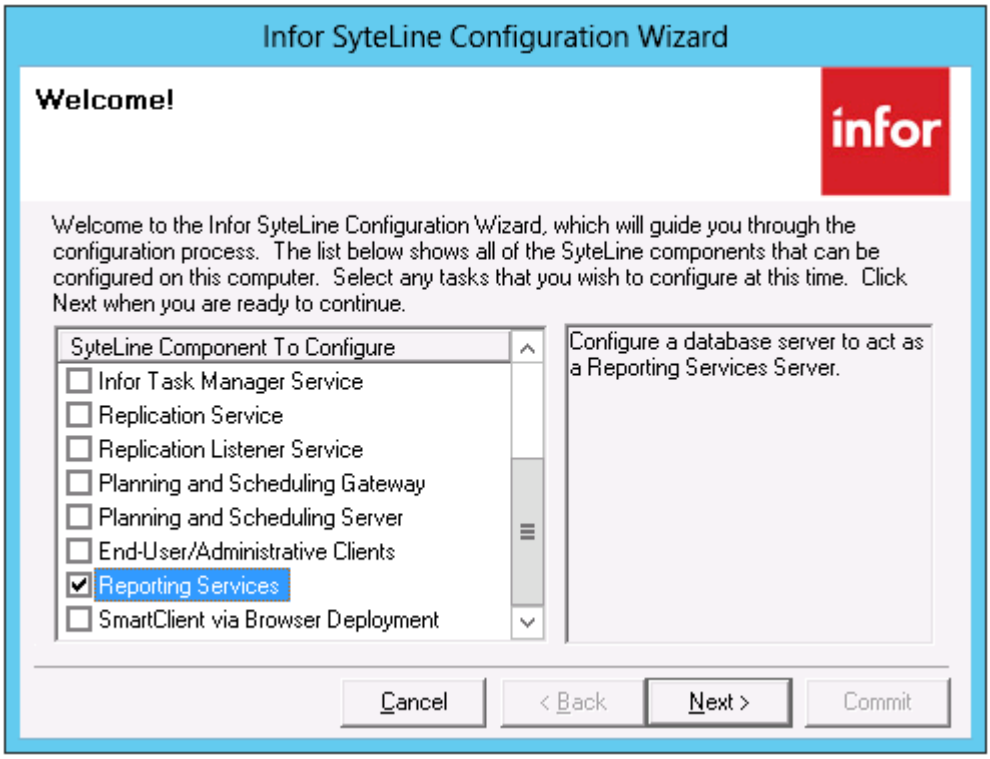
- If the QCS reports have previously been deployed, they will need to be deleted;

  a. Navigate your browser to (http://<SyteLineWebserver>/Reports/Pages/Folder.aspx?ItemPath=%2fSyteLineReports&ViewMode=List) replacing <SyteLineWebserver> with your server address

  b. Double Click on the SyteLineReports folder

  c. Find all of the RS_QC Files and right click and select Delete. If you wish to speed this up you can select details in the top right and select the checkboxes for all RS_QC reports and select delete at the top.

- Finally, start the Infor SyteLine Configuration Wizard and select Reporting Services. This will redeploy the .rdl's in the reports directory, along with the QCS Reports.



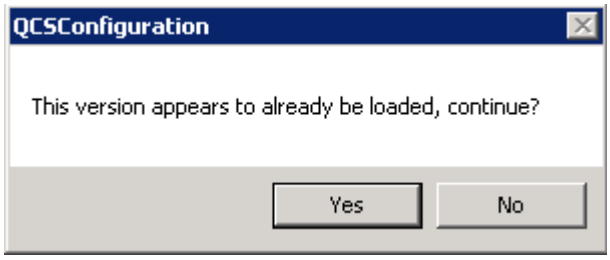
For QCS version 9.00.10 and above only, when the wizard is complete:

a) Open the **Trigger Management** form in SyteLine.
b) Regenerate triggers with a starting value of "RS_QCAction_mst" and an ending value of "RS_QCVstat_mst".

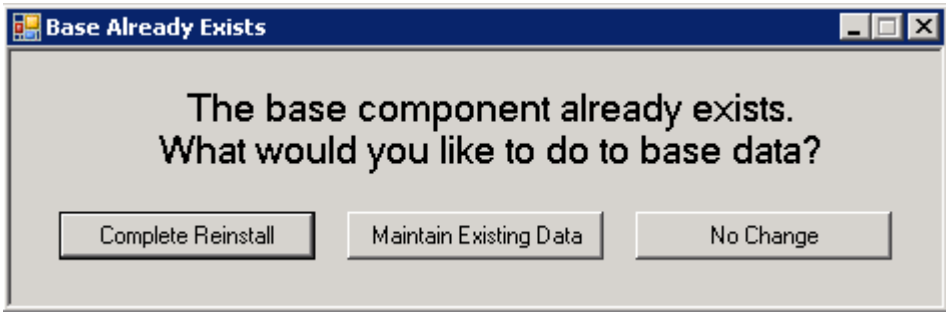
Upgrade and Re-installation Procedure for QCS 9.00

If you are already running QCS 4.04.XX – QCS 5.03.XX, running the QCS Configuration Wizard for QCS 9.00 will automatically update the schema for QCS 9.00.

If you are already running QCS 9.00 and need to install it again, upon clicking "Commit", you will first see the following prompt:



Clicking "No" will exit the wizard. Clicking "Yes" will lead you to this screen;



Clicking the "Complete Reinstall" button will perform a complete reinstall of QCS. Please note that this will cause the QCS tables to be dropped and re-added, and **will result in the loss of all QCS data**. This should only be used to refresh demo or test systems.

Clicking the "Maintain Existing Data" button will perform a partial reinstall of QCS. This will reapply the QCS stored procedures and forms, but will leave the current QCS data intact.

Clicking the "No Change button" button will re-apply the QCS forms but leave the application (stored procedures and data) intact.

Un-installing QCS 9.00

QCS contains an uninstaller program. This program will remove all parts of QCS except for IDO metadata and reports.

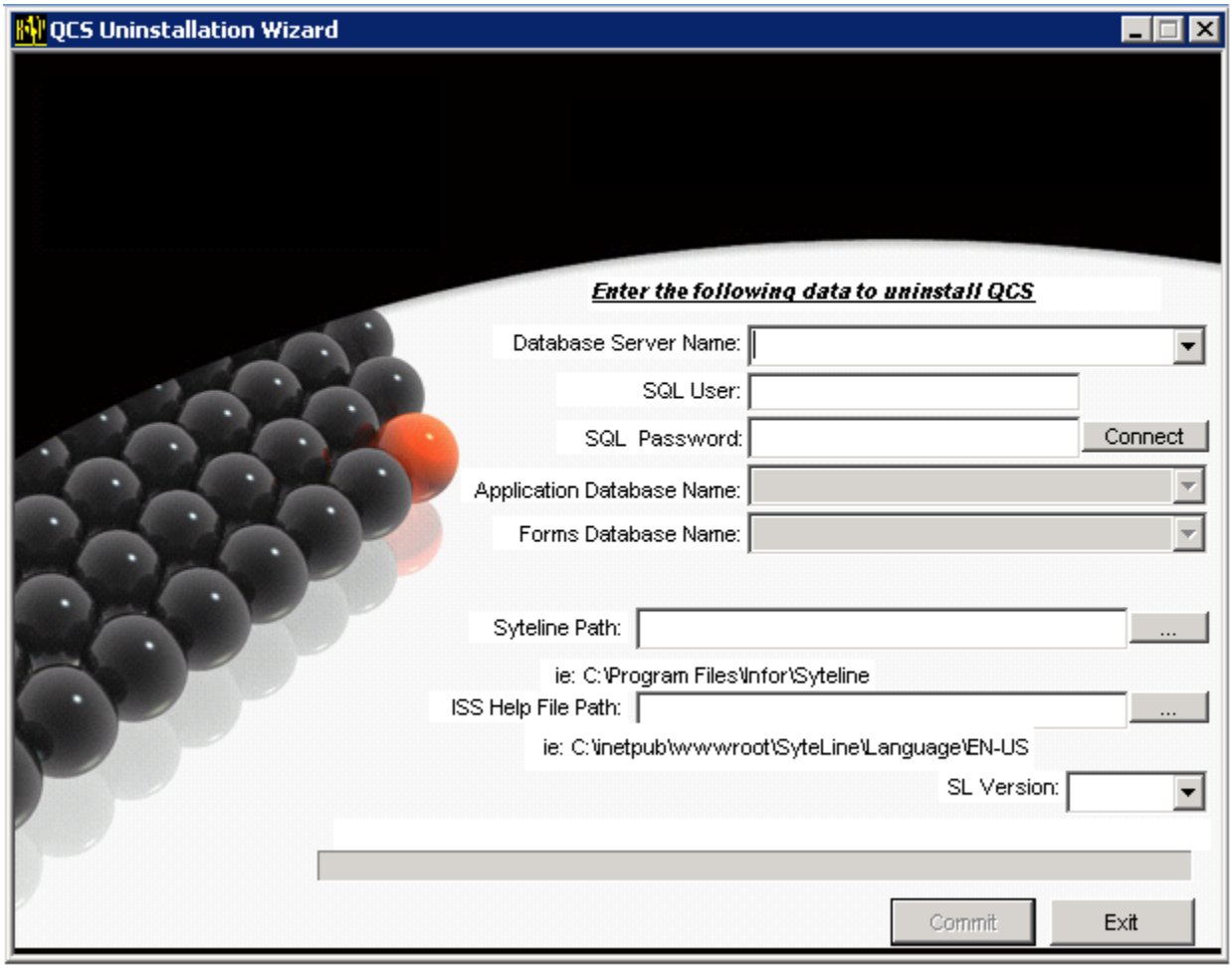
It will remove;

- Forms & Touchpoints
- Tables
- Stored procedures & Functions
- Data types
- Strings
- Menus
- Product data
- Account authorizations
- Reports
- Help Files

Un-Install Procedure

1) **Run the Uninstaller Wizard**

This file is located in the Program Files (or Program Files (86))\RSVP\QCS\Setup\QCSUninstaller.exe location. It is similar to the QCS Installation Wizard, but it will remove QCS. THIS WILL RESULT IN THE QCS TABLES BEING REMOVED. Do not run this wizard if you have any QCS data you want to keep. This process cannot be reversed without restoring the application and forms databases.



DESCRIPTION: This wizard is used to **Uninstall** QCS from your SyteLine database(s)

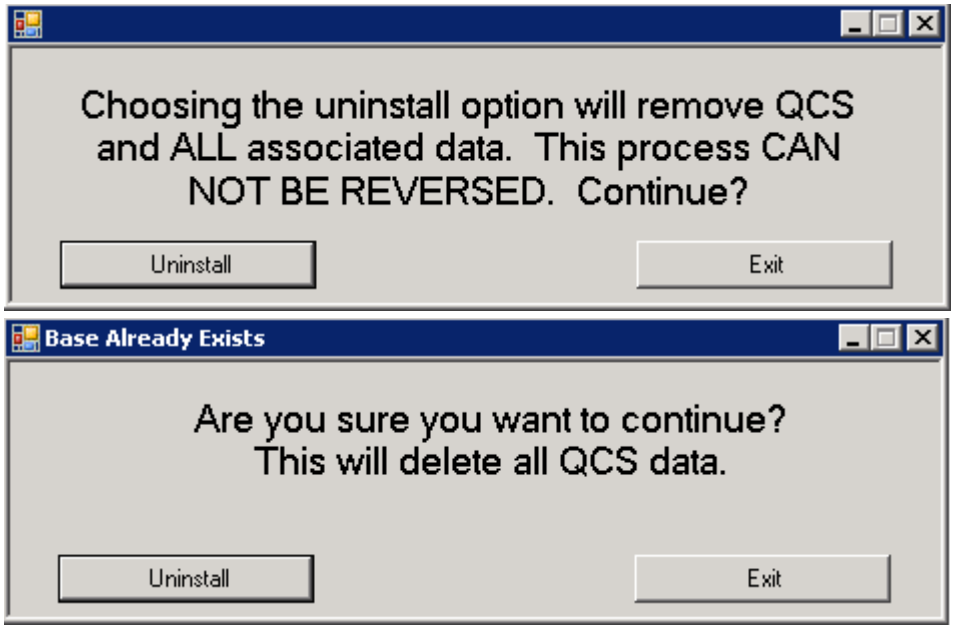
Field Descriptions:

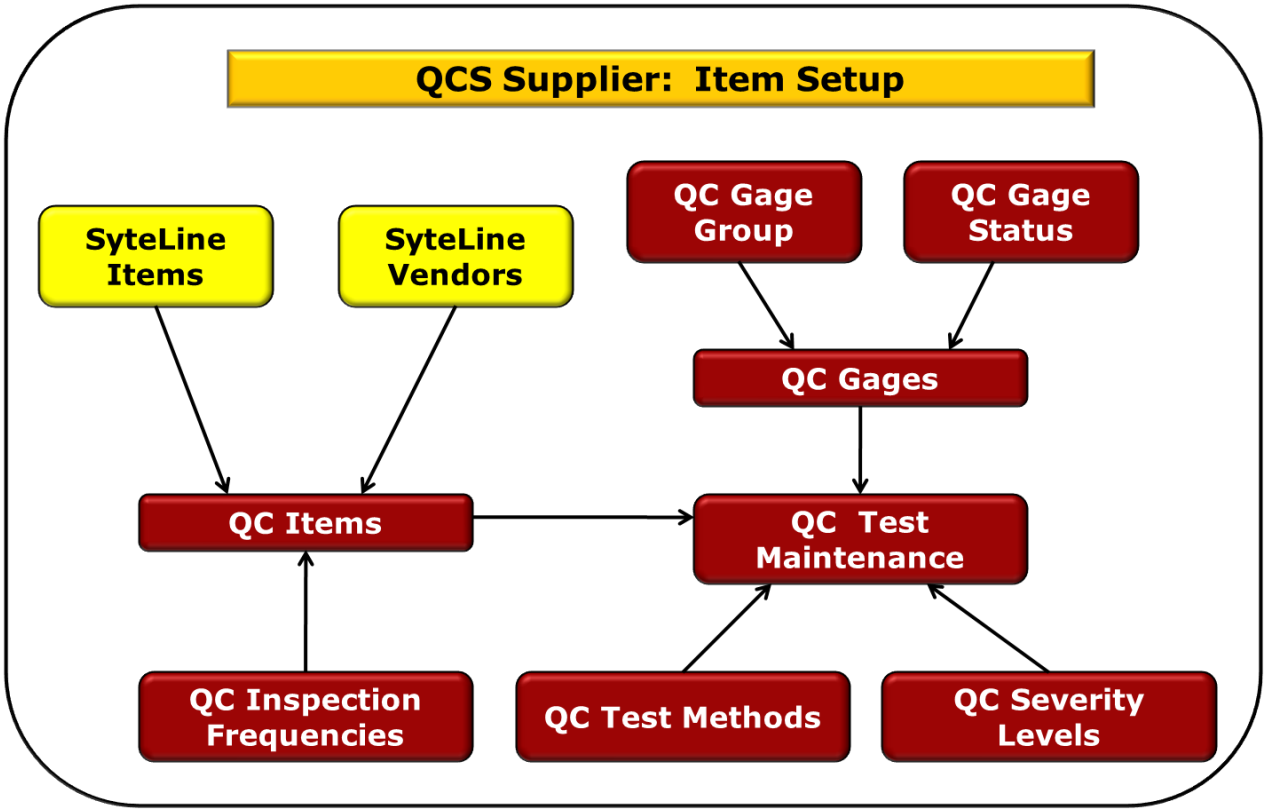
- **Database Server Name**

- **Database Server Name:** Name of the Database Server that contains the SyteLine databases.

- **SQL User:** Name of the SQL user used to connect to SQL
- **SQL Password:** Password for the SQL user connecting to the database server.
- **Connect Button:** Opens a data connection to the SQL server.
- **Application Database Name:** The application database you are applying QCS to.
- **Forms Database Name:** The forms database you are applying QCS to.
- **SyteLine Path:** This is the location of the SyteLine Reports folder.
- **ISS Help File Path:** This is the location of the SyteLine Help Files.
- **SL Version:** Select the version of SyteLine you are running from the dropdown list.
- **Commit Button:** Will run the QCS Configuration Wizard against the specified databases and file locations.
- **Exit Button:** Exits the Wizard with no changes applied to the system.

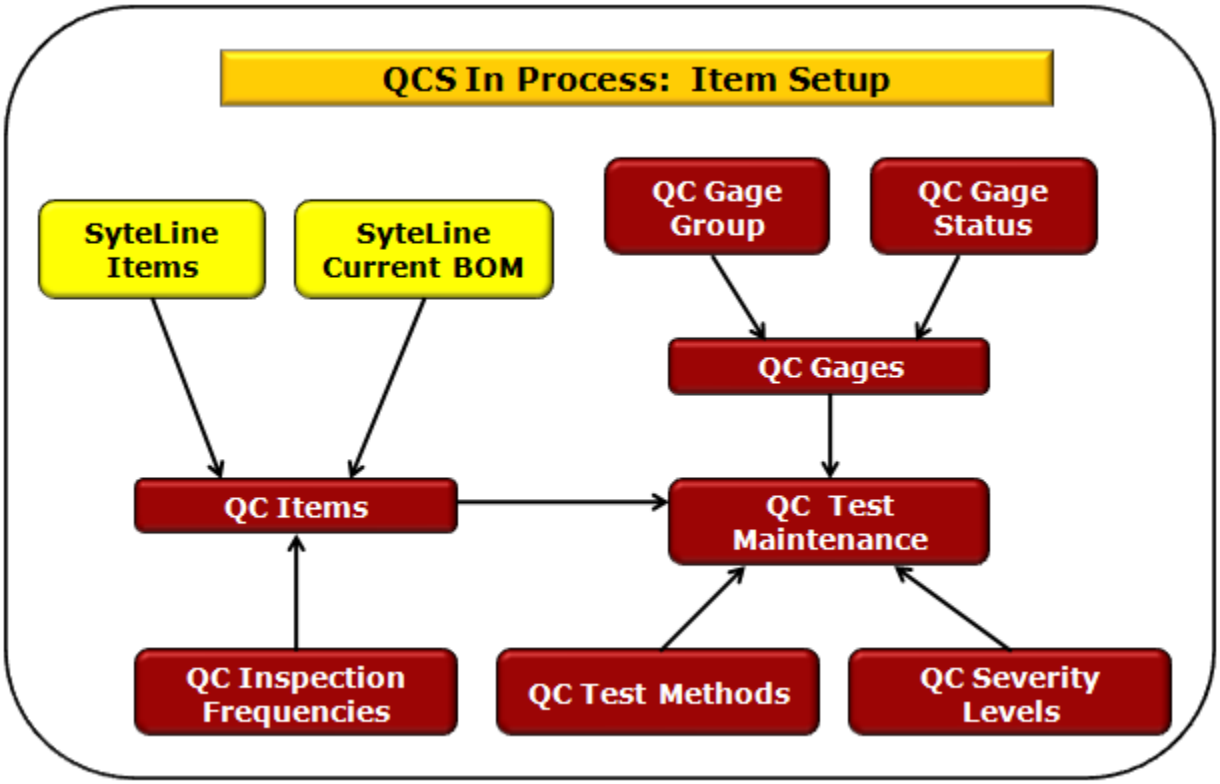
After clicking Commit, you will be prompted twice to confirm the removal of QCS.





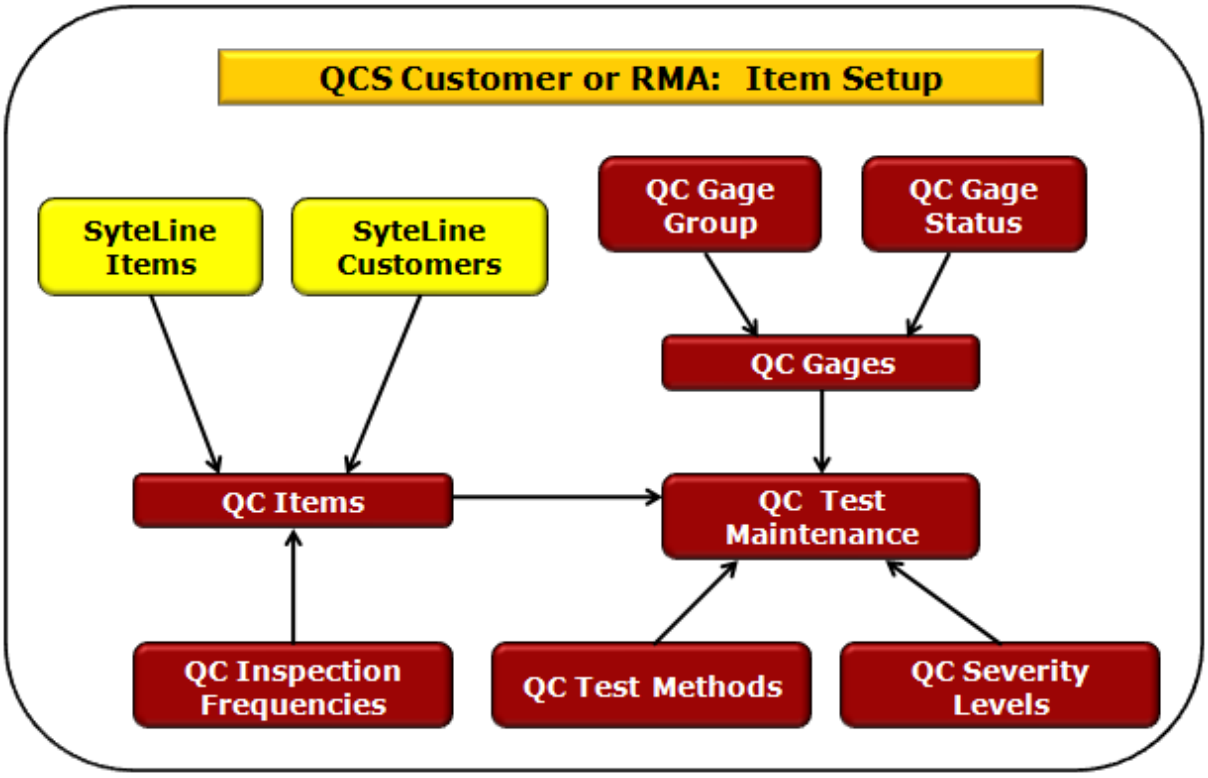
The diagram above shows the relationships among the tables that collectively define the QCS Item Master for Supplier QCS items.

Form Name	Description and Example entries
SyteLine Items	SyteLine Item Master Ex: AL-10000 Steel
SyteLine Vendors	SyteLine Vendor Master Ex: #6 Cromax Metal Supply Co.
QC Item Maintenance	Items to be tracked by QCS Ex: AL-10000, Cromax
QC Inspection Frequencies	How often are PO receipts routed to QC for Inspection? Ex: Every receipt, every 10th receipt, every 1000 parts received.
QC Test Maintenance	What measurements/tests are performed to measure the quality of the item? Ex: length, voltage, thickness
QC Gages	What equipment is needed to perform measurement? Ex: 5" Caliper, AC voltmeter
QC Gage Group	Type of Equipment: Ex: Caliper, Electronic meter
QC Gage Status	Status of the Gage: Ex: In service, out for calibration
QC Test Methods	How is the measurement made? Ex: Visual, meter reading
QC Severity Levels	How critical is this characteristic to overall quality? Ex: Critical, Cosmetic, Minor



The diagram above shows the relationships among the tables that collectively define the QCS Item Master for In Process QCS items.

Form Name	Description and Example entries
SyteLine Items	SyteLine Item Master Ex: FA-10000
SyteLine Current BOM	Operations in current BOM for item. Ex: Oper 10
QC Item Maintenance	Items to be tracked by QCS Ex: FA-10000, Oper 10, Seq 1
QC Inspection Frequencies	Inspection frequencies are not applicable for In Process QCS Items, a generic frequency is set up to fill in this field.
QC Test Maintenance	What measurements/tests are performed to measure the quality of the item? Ex: length, voltage, thickness
QC Gages	What equipment is needed to perform measurement? Ex: 5" Caliper, AC voltmeter
QC Gage Group	Type of Equipment: Ex: Caliper, Electronic meter
QC Gage Status	Status of the Gage: Ex: In service, out for calibration
QC Test Methods	How is the measurement made? Ex: Visual, meter reading
QC Severity Levels	How critical is this characteristic to overall quality? Ex: Critical, Cosmetic, Minor



The diagram above shows the relationships among the tables that collectively define the QCS Item Master for Customer QCS Items.

Form Name	Description and Example entries
SyteLine Items	SyteLine Item Master Ex: FA-10000
SyteLine Customers	SyteLine Customer Master Ex: Coordinated Bicycles
QC Item Maintenance	Items to be tracked by QCS Ex: FA-10000,
QC Inspection Frequencies	Inspection frequencies are not applicable for Customer QCS Items, a generic frequency is set up to fill in this field.
QC Test Maintenance	What measurements/tests are performed to measure the quality of the item? Ex: length, voltage, thickness
QC Gages	What equipment is needed to perform measurement? Ex: 5" Caliper, AC voltmeter
QC Gage Group	Type of Equipment: Ex: Caliper, Electronic meter
QC Gage Status	Status of the Gage: Ex: In service, out for calibration
QC Test Methods	How is the measurement made? Ex: Visual, meter reading
QC Severity Levels	How critical is this characteristic to overall quality? Ex: Critical, Cosmetic, Minor

SyteLine Setup for QCS

This section reviews the standard SyteLine forms used to set up QCS on your system.
QCS setup is a combination of standard SyteLine forms, and QCS forms.

User Authorizations

DESCRIPTION: Authorizations are needed for access to specific forms within SyteLine. For QCS, there have been 25 Groups set up which can be used to set up QCS users. Listed with each Group is the Objects that are authorized for that specific group.

- QC CAR/MRR Form/Reports
  CAR Form, CAR Status Report, MRR Form, MRR Status Report

- QC CAR/MRR Maintenance
  CARs, CAR Query, CAR Tests, MRR Query, MRR's, MRR Tests

- QC CCR Maintenance
  QC Customer Complaints, Product Line/Reason Code Responsibility, QC Customer Complaint Query

- QC CO Inspect
  CO Inspect/Disposition and Query, CO Dispositioning

- QC CO Receipt
  Create CO Receiver, CO Popup, CO Receiver Maintenance, Receiver Update Utility

- QC COC Form/Reports
  COC Maintenance, COC Query, COC's, COC Select, COC Report

- QC Code Maintenance
  QC Cause Codes, QC Reason Codes, QC Failure Codes, QC Gages, Gage Query, Gage History Query, QC Gage Type, QC Gage Status, QC Inspection Frequencies, QC Methods, QC Severity Levels, QC Vendors, QC Vendor Status, QC Vendor Query, Customer Query, QC Customers, Disposition Codes, Test Types

- QC General/Reports
  CAR Form, CAR Status Report, Customer Complaint Review Report, Customer Complaint Status Report, COC Report, Customer Available to Ship Report, Customer Inspection Status Report, Customer RMA Analysis Report, Customer RMA Value of Inventory Report, Defect Distribution Report, Gage Calibration Certificate, Gage Packing Slip, Gage Report, In Process Action Report, In Process Cost of Quality Report, In Process Cost of Scrap Report, In Process Item History Report, In Process Job Paperwork Report, In Process Outside Paperwork Report, In Process Quality Plan Report, In Process Results Worksheet, In Process Yield

Report, MRR Form, MRR Status Report, Reprint Tags, Supplier Item Detail Report, Supplier Item History Report, Supplier Ready for Inspection Report, Supplier Ready for Receipts Report, Supplier Value of Inventory Report, Supplier Vendor Performance Report, Supplier Vendor PPM Report, Supplier Vendor Status Report, Supplier VRMA Form, Supplier VRMA Pending Report, Supplier VRMA Status Report, Test Results Report, QC Transaction Report, Customer Final Inspection Worksheet(Reports and Queries for all QC modules)

- QC IP Inspect
  IP Query, IP Job Inspect/Disposition, PS Inspect/Disposition, PS Query, QC Miscellaneous Move, QC Miscellaneous Issue, Receiver Update Utility, Regular Disposition

- QC IP Receipt
  Create IP Receiver, Create PS Receiver, IP Popup

- QC Maintenance
  QC Copy tests, QC Items, QC Items Query, QC Item Tests, Copy Tests

- QC Parameter Maintenance
  QCS General Parameters, IP Parameters, Supplier Parameters, Customer Parameters

- QC Quick MRR
  QC Quick Receiver/MRR, IP Popup, Supplier Popup

- QC RMA Inspect
  QC RMA Inspect, QC RMA Query, Regular Dispositioning, QC Miscellaneous Move, QC Miscellaneous Issue, Receiver Update Utility

- QC RMA Receipt
  Create RMA Receiver, CO Popup

- QC Supplier Inspect
  Supplier Inspect, Supplier Query, Regular Dispositioning, QC Miscellaneous Move, QC Miscellaneous Issue, Receiver Update Utility

- QC Supplier Receipt
  Create Supplier Receiver, Supplier Popup

- QC Test Results
  Create Test results, Create QC Serial Numbers

- QC Shipping
  COC Select

- QC VRMA Form/Reports
  Supplier VRMA Form

- QC VRMA Maintenance
  VRMA Miscellaneous Issue, VRMA Miscellaneous Receipt, VRMA Query, VRMA Maintenance, VRMA Voucher

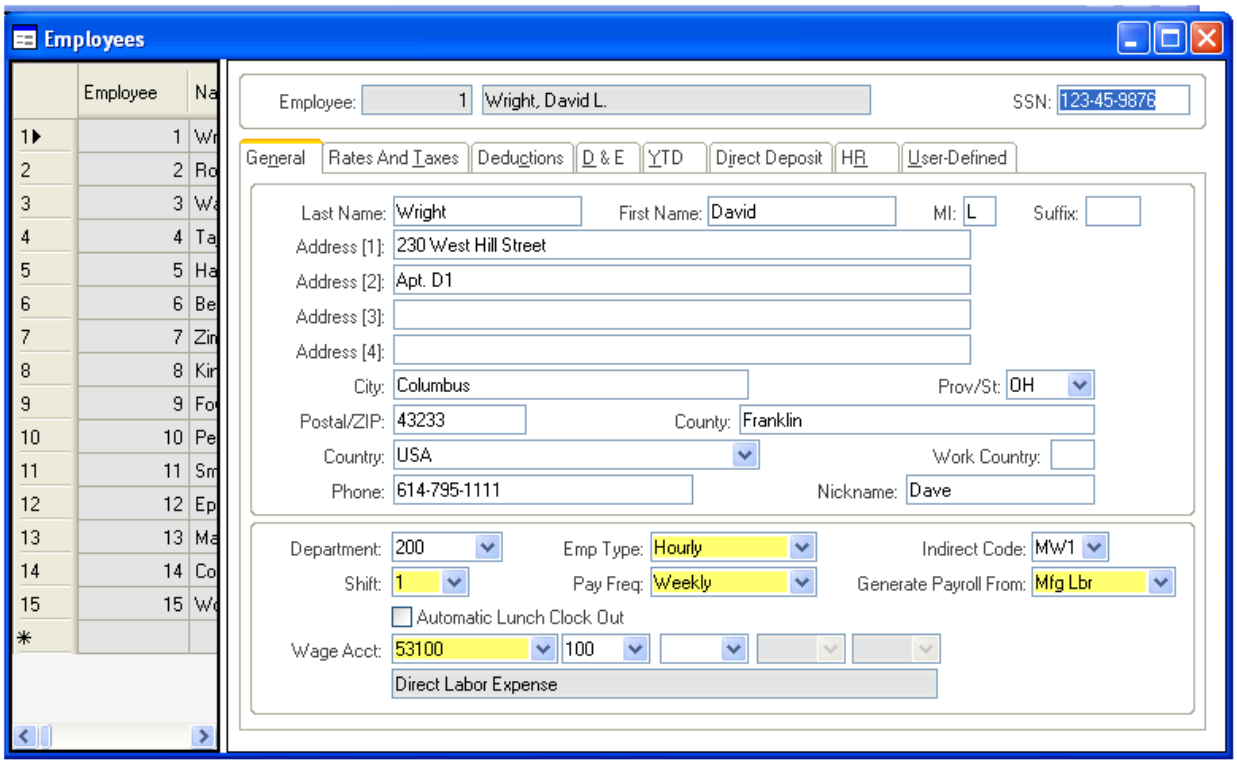
- QC Enterprise Entry
  Change Creation, Topic Receivers

- QC Enterprise Management
  Change Management, CMR Costing, CMR Documentation, CMR Headers, CMR Machine/Tooling, CMR Material, CMR Process, CMR Query, Topic Receiver Management, TRR Query, TRR's, Change Management

- QC Enterprise Codes
  Change Types, Status Listings, Topics, QC Priorities

- QC Enterprise Reports
  CMR Form, CMR Status Report, TRR Form, TRR Status Report

Inspectors



Employees

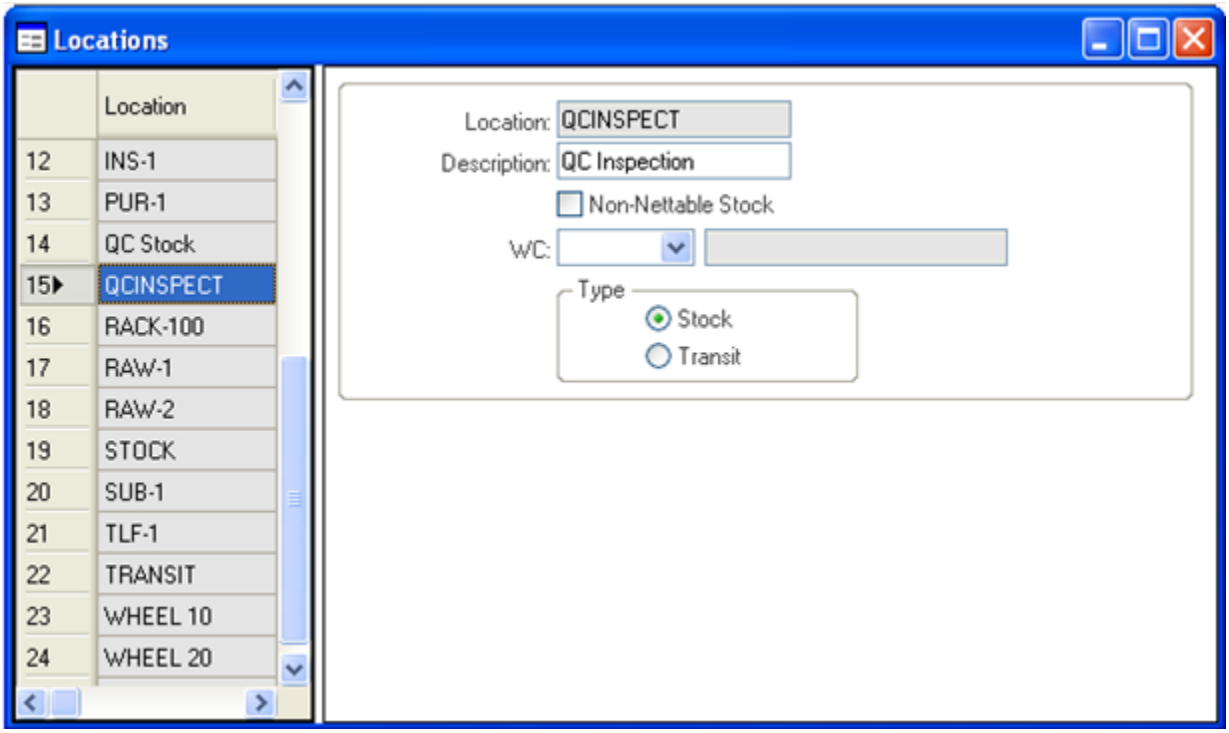
DESCRIPTION: Within QCS, there are prompts for 'Inspector'. If you wish to validate inspectors, (see the QCS Parameter forms), the field will validate against the SyteLine Employees. Use the standard SyteLine Employees form to set them up.

Minimum information required to set up an employee: name, shift, and wage account.

Note:

1) **This is an optional feature in QCS.**

QC Stockroom Location(s)



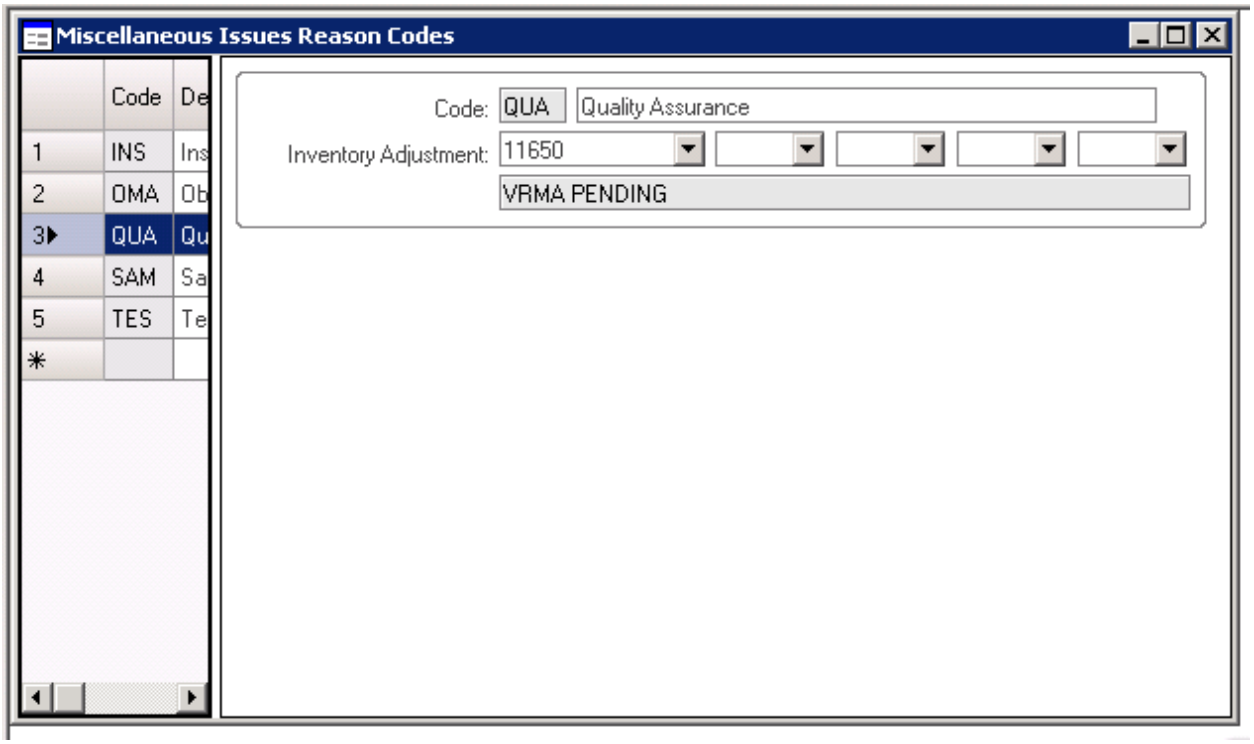
Locations

DESCRIPTION: Set up one or more locations to be used as a holding location for the QC department. If multiple locations are used, it is recommended to have them all start with a unique combination of characters (such as: 'QC', 'QCDock', 'QCStock'). Alternately, set up one location for all QC holding, (such as 'QCINSPECT'). Any location used must first be set up as a valid location using the SyteLine Locations form.

Within QCS, the default QC location to use is defined on the QC Supplier Parameters (page *60*) and QC Customer Parameters (page *70*).

Note:

1) **This is an optional feature within QCS.**

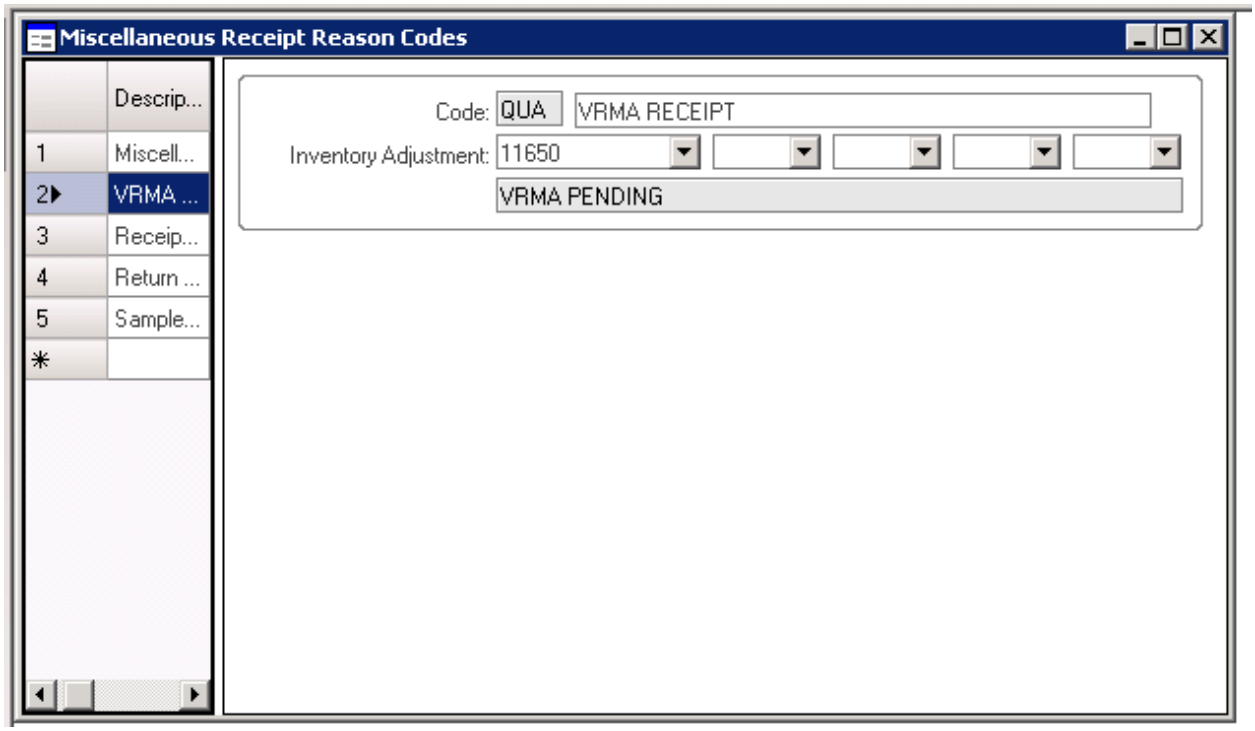


Miscellaneous Issues Reason Codes

DESCRIPTION: QCS can call a Miscellaneous Issue form from the dispositioning process, and/or from QC Vendor RMA process. You may wish to set up specific SyteLine Miscellaneous Issues Reason Codes for these transactions (or you may use existing codes).

Note:

1) **This is an optional feature within QCS.**



Miscellaneous Receipt Reason Codes

DESCRIPTION: QCS can call a Miscellaneous Receipt form from the QC Vendor RMA process. You may wish to set up specific SyteLine Miscellaneous Receipt Reason Codes for these transactions (or you may use existing codes).

Note:

1) **This is an optional feature within QCS.**

Vendor RMA Pending Account

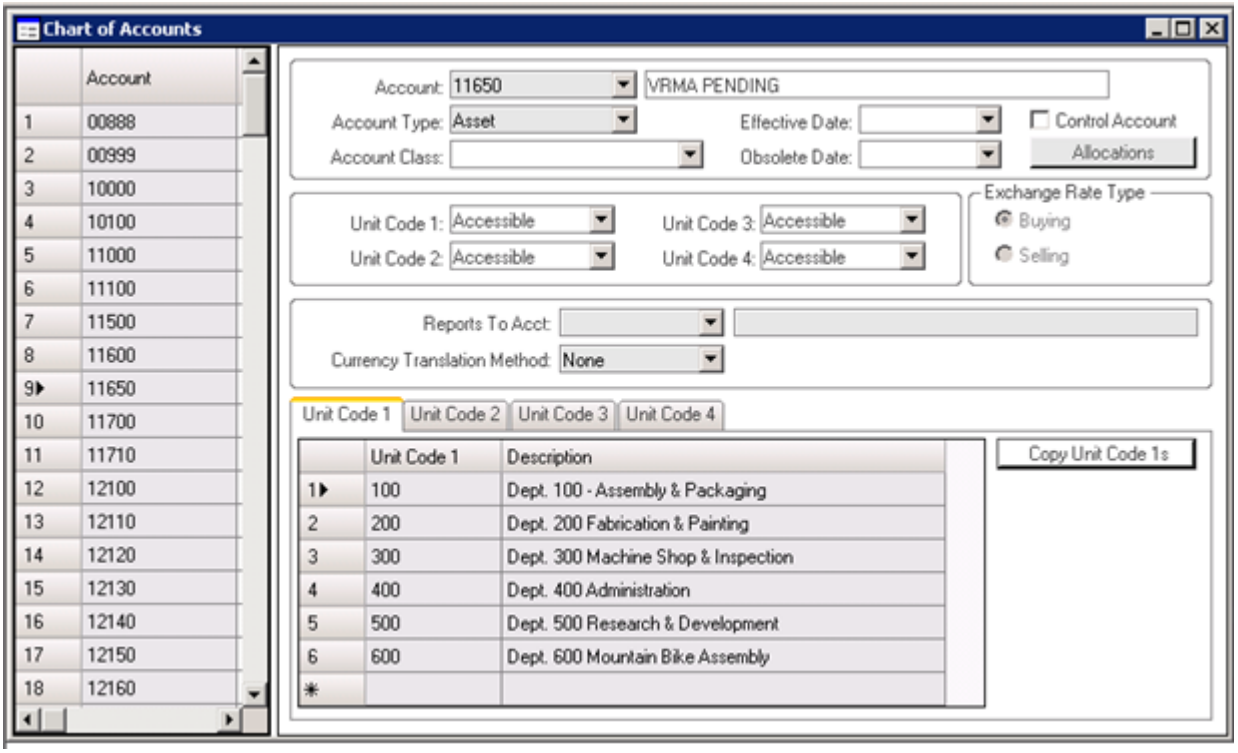


Chart of Accounts

DESCRIPTION: If you wish to, you may set up a specific/new account for QC VRMA Pending values. This Asset account will be used to post dollars for material returned to vendor.

Vendor RMA Loss Account

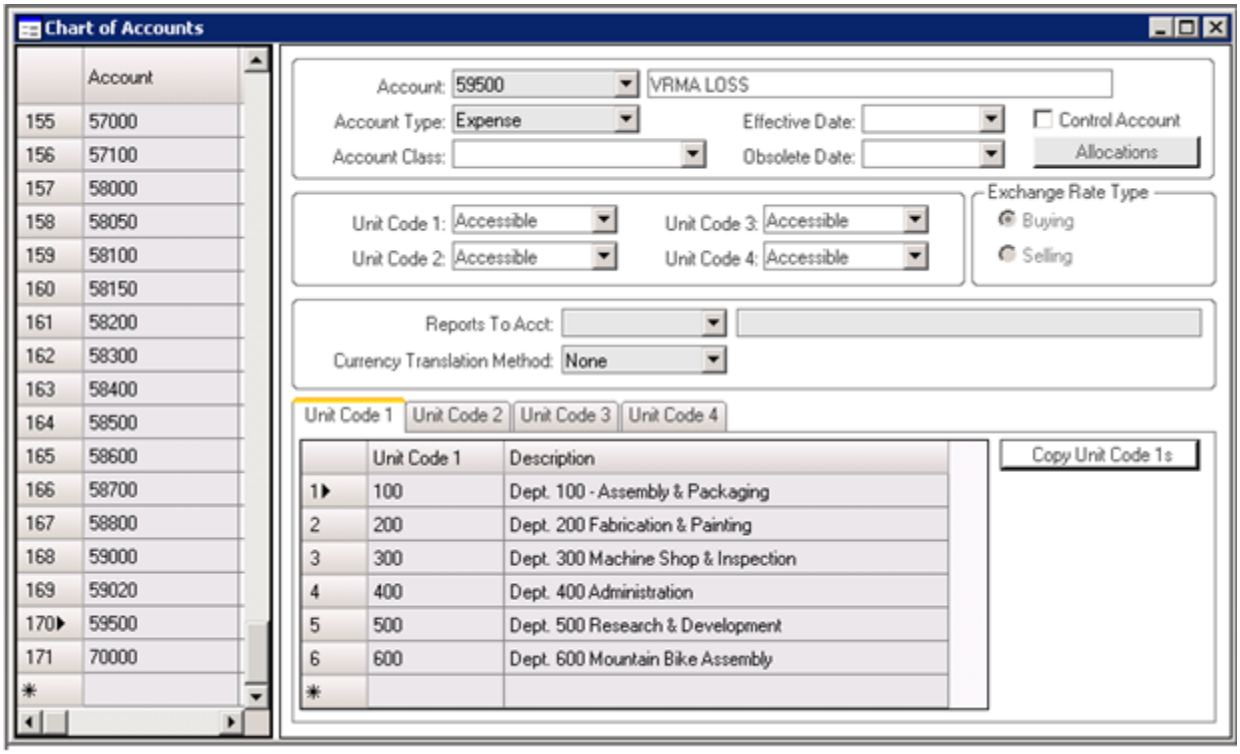


Chart of Accounts

DESCRIPTION: If you wish to, you may set up a specific/new account for QC VRMA Loss values. This Expense account will be used to post dollars for the difference between the value of the returned material and the actual credit issued by the vendor.

The VRMA Loss Account is only used when a vendor's credit is recorded against a VRMA. If the amount of the credit (per unit) is not equal to the purchase unit price, the difference is charged to the VRMA Loss account.

Example: A widget is purchased for $20. A VRMA is created for the widget--$20 is posted to the VRMA Pending account. When a credit for $18 is received--$20 is removed from the VRMA pending account, $18 is created on a voucher to Account Payable and $2 is charged to VRMA Loss.

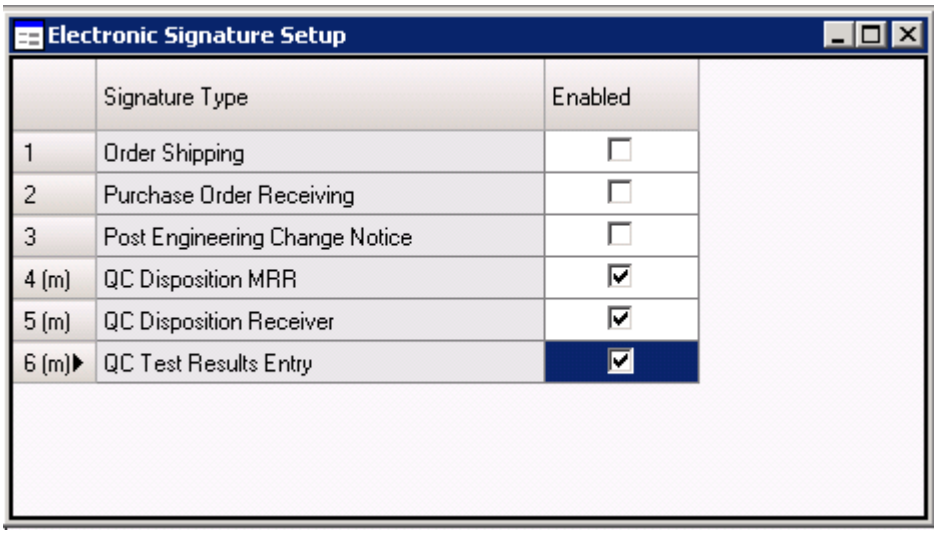
SyteLine Setup for QCS Electronic Signatures

Infor 10 ERP Business (SyteLine 8.03) introduced optional electronic signature functionality in the Purchase Order Receiving, Order Shipping and ECN Change Notice forms. In QCS 5.03.00, we added electronic signature functionality to the QC Disposition, MRR Disposition, and Test Results Entry.

Enabling Electronic Signature Functionality

SyteLine must be configured for electronic signatures prior to use. This involves setting up the Electronic Signature Setup Form and Electronic Signature Authorizers.

Electronic Signature Setup Form

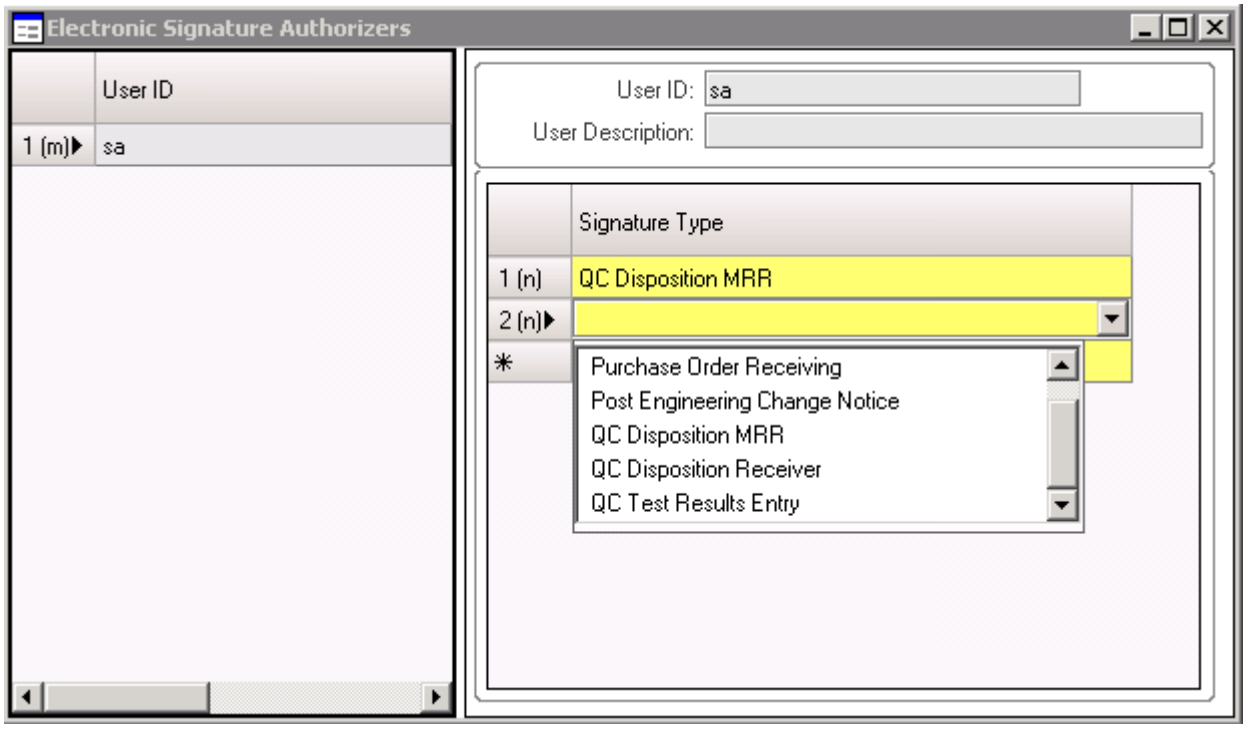


DESCRIPTION: The electronic Signature Setup screen is used to turn on the QCS electronic functionality.

Check the enabled box for the specific signature type that you want to enable in QCS.

Note: Before you can use the signatures, you must set up the users who will be authorized to use signatures via the Electronic Signature Authorizers screen.

Electronic Signature Authorizers

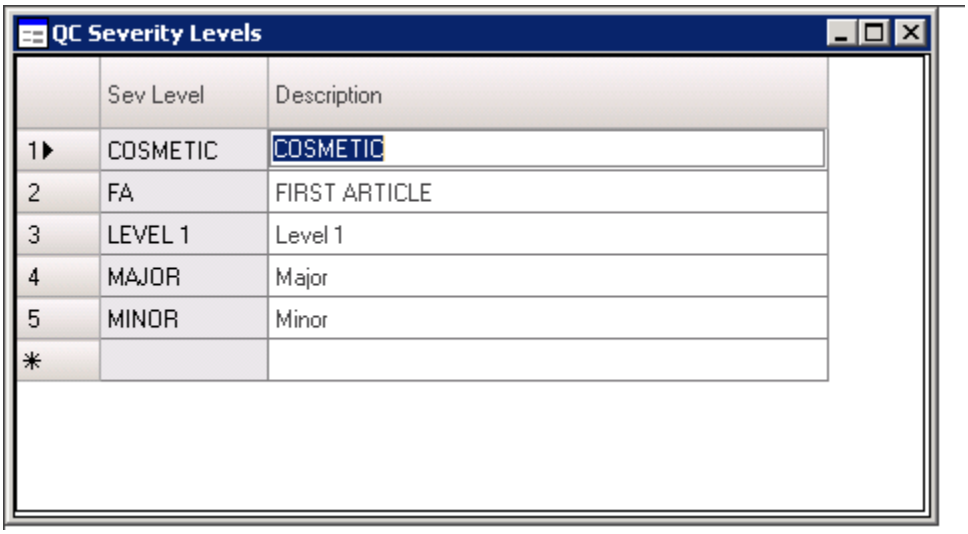


DESCPRIPTION: This is a standard SyteLine form, and you would follow the standard procedure to add specific users as authorized to complete specific electronic signatures.

QCS Setup

The following section describes codes, parameters and data specific to QCS that can or must be set up prior to using QCS.

QC Severity Levels



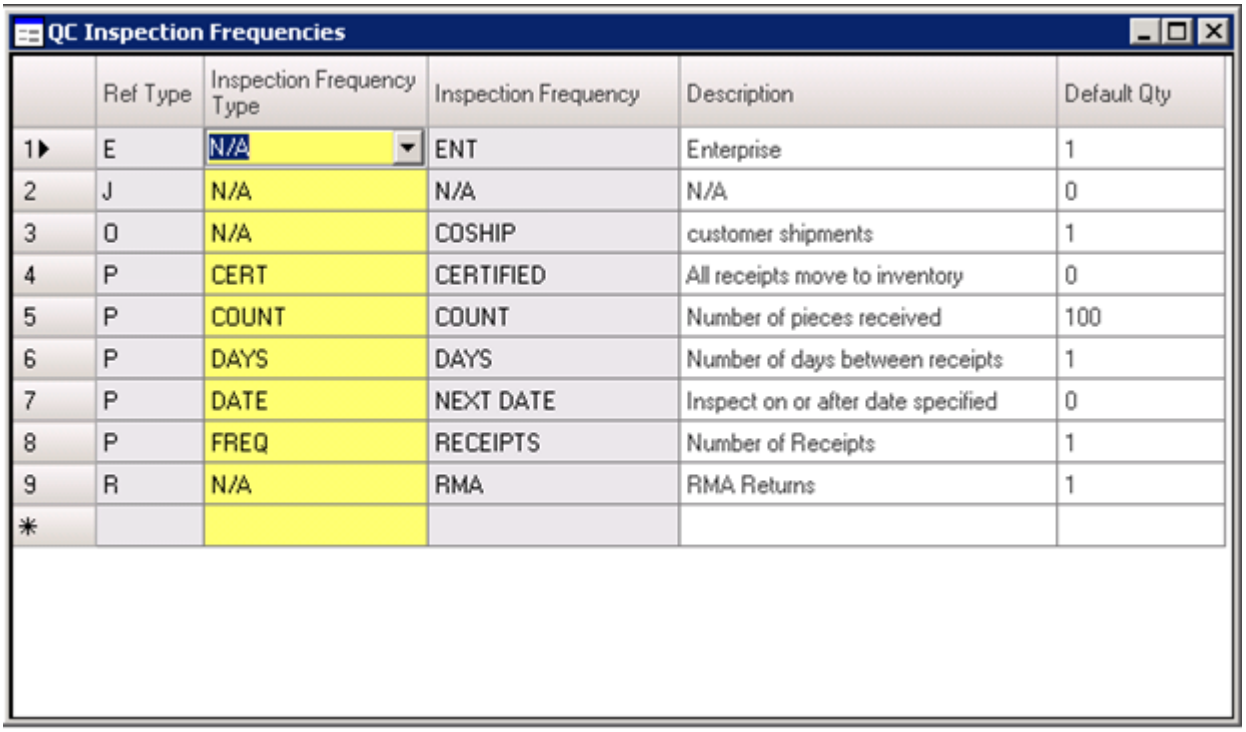
QC Severity Levels

DESCRIPTION: This form allows the user to add, change, or delete Severity Level codes. Severity Level Codes are used when setting up inspection details/tests for an item. This is an information code to show internally how critical a characteristic is to the quality of an item. Severity Levels are informational only, and do not impact an item's disposition.

Field Descriptions:

- Severity Level: A unique user defined code
- Description: Description of the code

QC Inspection Frequencies



	Ref Type	Inspection Frequency Type	Inspection Frequency	Description	Default Qty
1	E	N/A	ENT	Enterprise	1
2	J	N/A	N/A	N/A	0
3	O	N/A	COSHIP	customer shipments	1
4	P	CERT	CERTIFIED	All receipts move to inventory	0
5	P	COUNT	COUNT	Number of pieces received	100
6	P	DAYS	DAYS	Number of days between receipts	1
7	P	DATE	NEXT DATE	Inspect on or after date specified	0
8	P	FREQ	RECEIPTS	Number of Receipts	1
9	R	N/A	RMA	RMA Returns	1
*					

QC Inspection Frequencies

DESCRIPTION: This form allows the user to edit Inspection Frequency IDs for all modules. A Frequency ID is required for each QCS Item. For QCS Supplier, the Frequency ID is used to determine (based on PO Receiving history for the item) if and when the current receipt should go through QCS (when auto-creating receivers in Purchase Order Receiving). For In Process and Customer the frequency is informational only.

Field Descriptions:

- Ref Type: **P**(urchase)/Supplier, **J**(ob)/In Process, **O**(rder)/Customer, **R**(eturn)/Customer
- Inspection Frequency Type: System defined codes (defined below in more detail) indicating how this frequency should act. For In Process and Customer Frequencies, the N/A Frequency Type should be used.
- Inspection Frequency: User defined code
- Description: Description of the Inspection Frequency code
- Default Qty: Defines a numeric value of days, frequency or count to use as the default when this frequency is applied to an item in QC Item Maintenance. When this frequency is selected in QC Item Maintenance Form, the item's inspection quantity or date defaults based on this value.

P(urchase)/Supplier Inspection Frequency Type Logic:

CERT

No inspection by Quality is needed when it is received. If system is set to automatically mark all skipped receipts as 'ACCEPTED', all 'CERT' type receipts are marked as ACCEPTED. No quantity is required or used for this Inspection Frequency Type.

COUNT <QCS Item Inspection Break Qty>

During Purchase Order Receiving, items will move into QCS inspection when the quantity received since the last QC event reaches or exceeds the quantity set up for this QCS Item. When setting up an item for a 'COUNT' frequency type, the QCS Item Inspection Break Qty will default to the value set for the selected Inspection Frequency. Example:

Inspection Break Qty on QCS item = 100
PO Receipts of: 01/06/07 qty 40; 01/13/07 qty 40; 01/20/07 qty 40; 01/27/07 qty 40

Receipt for 01/06/07 will move into QCS (as no previous receipts have been through QCS)
Receipt for 01/13/07 will be skipped (as only 40 have been received since last inspection)
Receipt for 01/20/07 will be skipped (as only 80 have been received since last inspection)
Receipt for 01/27/07 will move into QCS

DATE <QCS Item Next Inspect Date>

During Purchase Order Receiving, if the receive date is on or after the date specified for this QCS Item, the receipt will move to QCS. Inspection Dates need to be changed manually on QCS Items. When setting up an item for a 'DATE' frequency type, the QCS Item Next Inspect Date defaults to the current date plus the default quantity number of days.

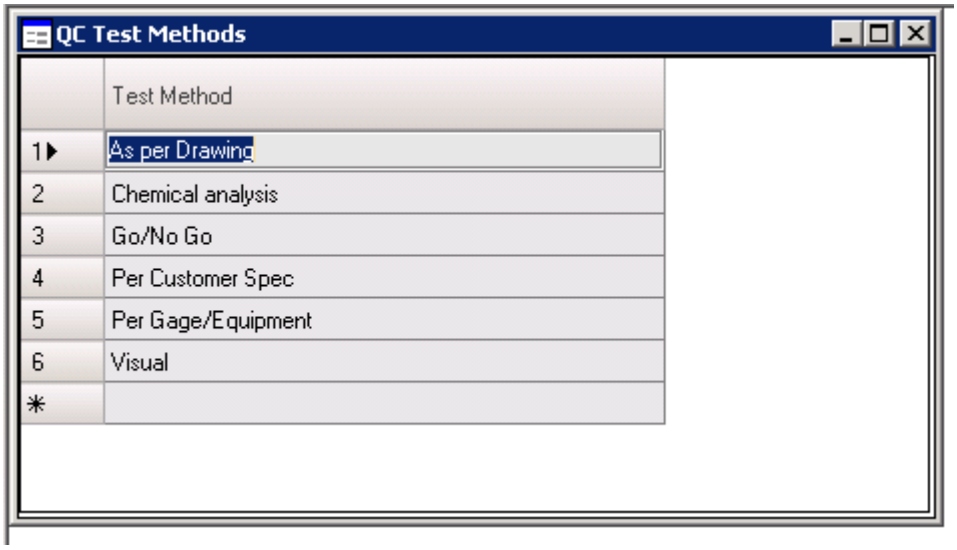
DAYS *<QCS Item Next Inspect Date>*
During Purchase Order Receiving, if the receive date is on or before the date specified for this QCS Item, the receipt will move to QCS. The 'next inspect date' will then be calculated based on the Inspection Break Qty for this QC Item, and the QC Item record is updated. When setting up an item for a 'DAYS' frequency type, the QCS Inspection Break Qty will default to the value set for the selected Inspection Frequency, and the QC Item Next Inspect Date will be set to the current date, plus the number of days in the default quantity.

FREQ <QCS Item Inspection Break Qty>
Example: Inspection Break Qty on QCS item = 3
PO Receipts of: 01/06/07; 01/13/07; 01/20/07; 01/27/07; 02/03/07; 02/10/07 …
Receipt for 01/06/07 will move to QCS (as no previous receipts have been through QCS)
Receipt for 01/13/07 is skipped (it is the 1st receipt since the last QC event)
Receipt for 01/20/07 is skipped (it is the 2nd receipt since the last QC event)
Receipt for 01/27/07 will move to QCS (it is the 3rd receipt since the last QC event)

Notes:

1) **Add, Change and Delete is permitted.**
2) **Inspection Frequencies for In Process, Customer and RMA are informational only. There is no automatic receipt into QCS using frequency logic for those modules.**
3) **For Supplier, neither the QCS Item nor QCS Vendor status has any impact on whether or not items are moved into QCS.**

QC Test Methods



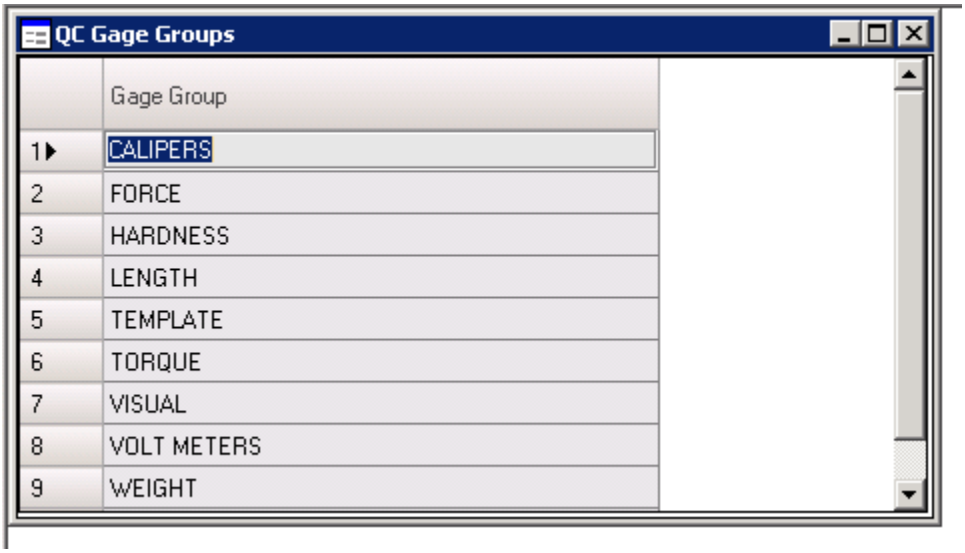
QC Test Methods

DESCRIPTION: This form allows the user to add or delete from the list of allowable methods by which tests are performed; i.e. how is the measurement made. Common entries include: Visual, Go/No-Go, Gage Reading and Test Equipment Reading.

Field Descriptions:

- Test Method: User defined entry

QC Gage Group



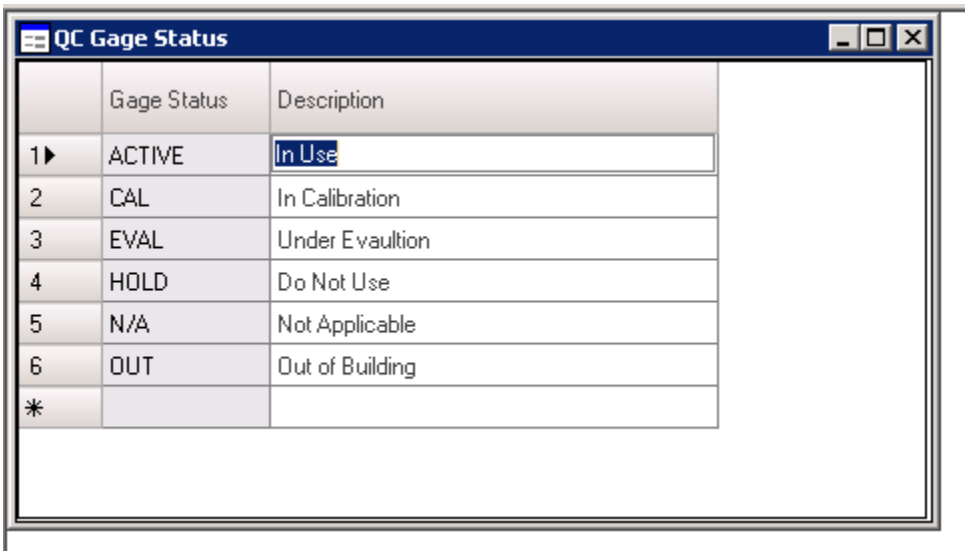
QC Gage Group

DESCRIPTION: This form allows the user to add or delete the types of equipment needed to perform tests on material in the QC department. This is part of the Gage Master setup. Typical Gage Types: Calipers, Voltmeter Meters, Custom equipment.

Field Descriptions:

- Gage Group: User defined entry

QC Gage Status



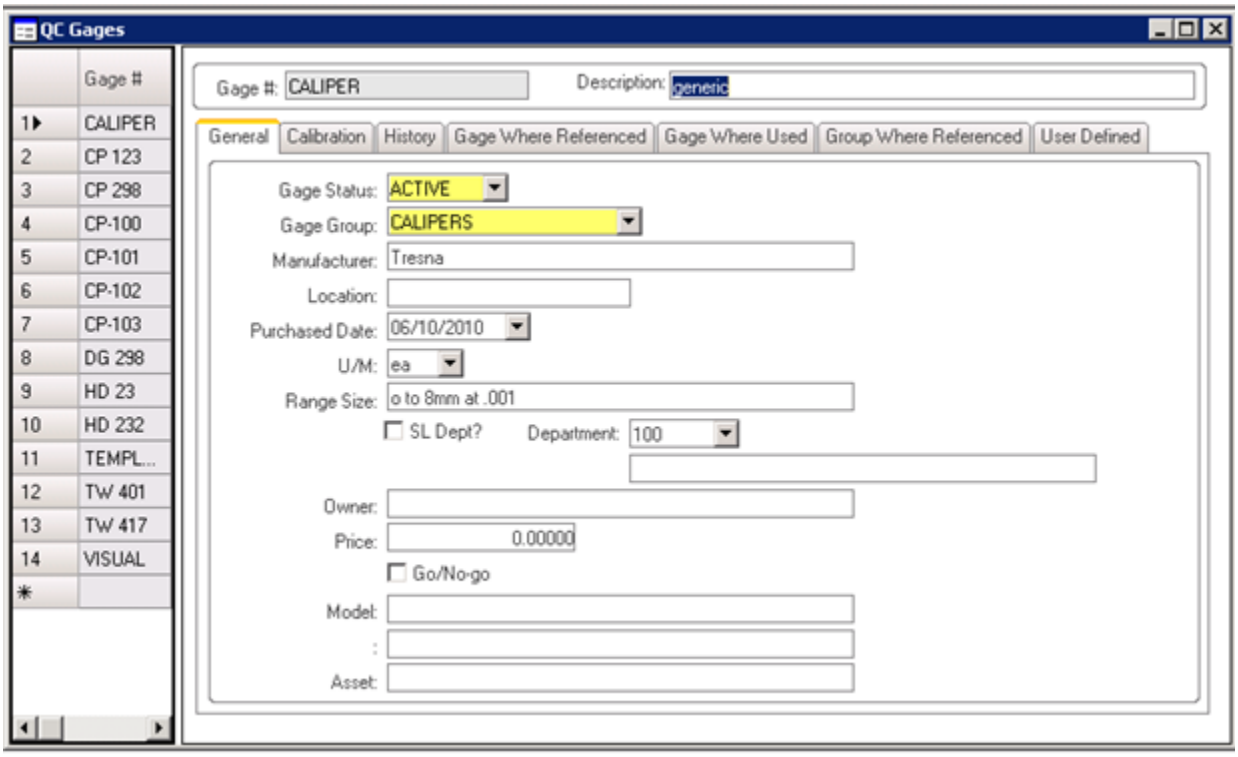
QC Gage Status

DESCRIPTION: This form allows the user to Add, Change and Delete the allowable statuses of gages needed to perform tests. This is part of the Gage Master setup. Common entries include: In-Service, Out for Calibration, Retired.

Field Descriptions:

- Gage Status: User defined entry
- Description

QC Gages



QC Gages

DESCRIPTION: This form allows the user to edit the list of equipment used to perform tests/ measurements. This list is used as part of the setup of the QCS item tests. Typical entries are: 6" Caliper, AC/DC 50V Voltmeter, and 36 "Ruler.

Field Descriptions:

Header

- Gage # (required): A unique ID number. System defaults to next available #. Can be edited
- Description: Describes the gage/equipment

General Tab

- Gage Status (required): Validates against Gage Status Table
- Gage Group (required): Validates against Gage Group Table
- Manufacturer: User defined
- Location: User defined

- Purchased Date: User selected date
- U/M: Can use entry from SyteLine unit of measures, or user defined value
- Range Size: User defined
- SL Dept?: Indicates if (next field) Department is to be validated against SyteLine Department table or not (checked = validate)
- Department: User defined or SyteLine department and description
- Owner: User defined
- Price: User defined
- Go/No-go: User defined
- Model: User defined
- S/N: User defined
- Asset: User defined

Calibration Tab

- Last Calibration Date: User selected date
- Interval: Required number of (calendar) days between calibrations
- Next Calibration Date: Will be calculated based on Last Calibration Date and Interval
- Last Cal by: User defined
- External Calibration: User defined
- SL Vendor?: Indicates if (next field) Vendor is to be validated against SyteLine Vendor table or not (checked = validate)
- Vendor: User defined or SyteLine Vendor
- Name: Vendor Name
- Cal Note: User defined

History Tab

This tab is used to enter and track calibration for this gage.

- Trans Num: System generated transaction identifier
- Date: User defined
- Last Cal By: User defined
- Status: Complete/In Process/Ordered/Out to Vendor
- Cal Note: User defined
- In Cal When Received: User defined
- In Cal When Returned: User defined
- Parts Replaced: User defined
- PO: User defined
- Cal Cost: User defined
- Cal Time: User defined

Gage Where Reference Tab

- View-only list of QC Item Tests that reference the current Gage

Gage Where Used Tab

- View-only list of QC Item Test Results that reference the current Gage

Group Where Referenced Tab

- View-only list of QC Item Test plans that are associated with the gage group

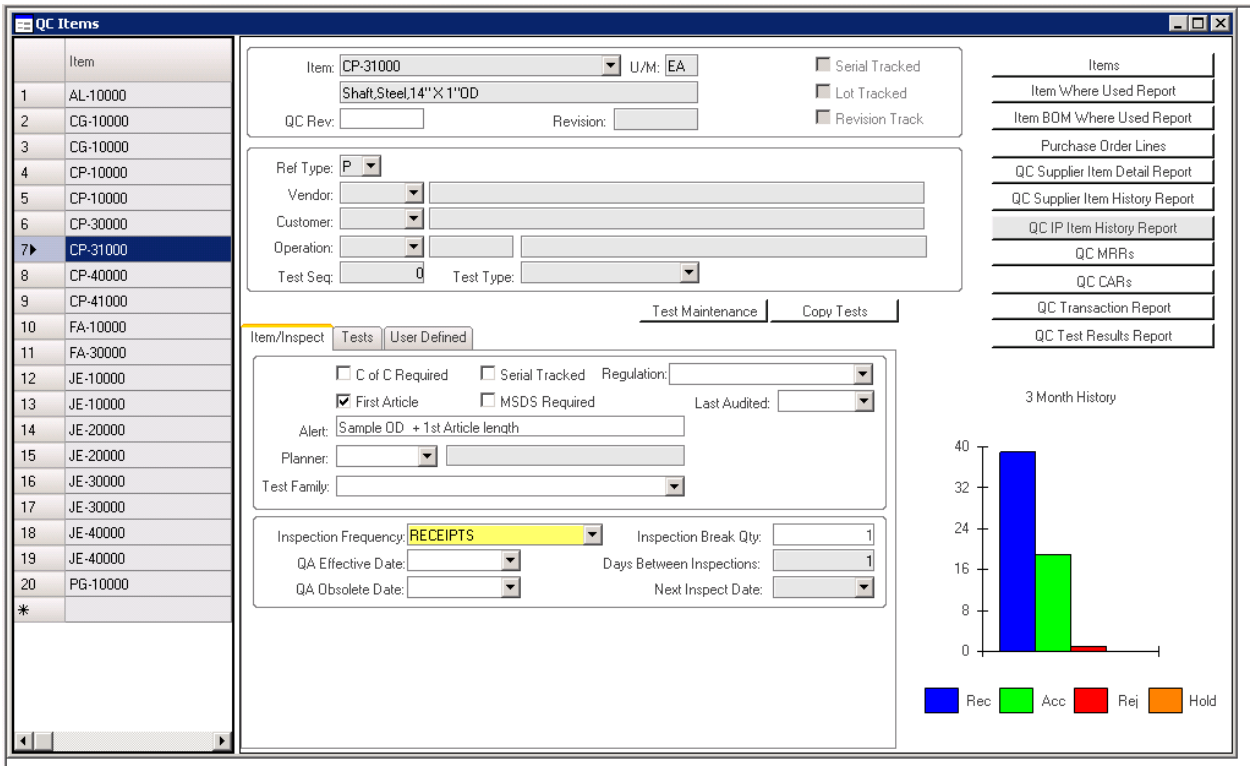
User Defined Tab

- Access to the standard SyteLine 9.00 user defined fields

Note:

1) **The Gage Number can be alpha-numeric and must be unique.**

QC Items



QC Items

DESCRIPTION: This form allows the user to; Add, Change or Delete QCS items for the Supplier, In Process and Customer modules.

Field Descriptions:
Header

- Item (required): Valid SyteLine Item number. Item description will display
- U/M (read-only): SyteLine unit of measure for the item
- QC Rev: QC Revision – user defined
- Revision (read-only): SyteLine revision for the item
- Serial Tracked (read-only): SyteLine item setting
- Lot Tracked (read-only): SyteLine item setting

- Revision Tracked (read-only): SyteLine item setting
- Ref Type (required): "P" = Purchased (Supplier); "J" = Job (In Process); "O" = Order (Customer); "R"= RMA Return (Customer)
- Vendor: For Ref Type = 'P' only – can be left blank, or a valid SyteLine Vendor number. Vendor name will display. If blank, the item and its tests apply to all vendors for this item, unless there is a specific item/vendor combination set up.
- Customer: For Ref Type = 'O" or 'R' only – can be left blank, or a valid SyteLine Customer number. Customer name will display. If blank, the item and its tests apply to all customers for this item, unless there is a specific item/customer combination set up.
- Operation: For Ref Type 'J' only (required) – must be a valid operation from the item's current BOM. Operation's work center and the work center description will display.
- Test Seq: For Ref Type "J" only (required) – indicates the sequence of inspection steps for an operation. Default is 10, and system will auto-generate by 10 for this operation.
- Test Type: For Ref Type "J" only – information about the type of test to be run at this operation (1st piece, Final, etc.)
- Test Maintenance button: link to QC Item Tests for this item (see page *53*)
- Copy Tests button: link to Copy Tests Form (see page *52*)

Item/Inspection Tab

- C of C Required: If checked, for Ref Type = 'P': displays a message during creation of a QCS Receiver indicating that the receiving person should verify that certification paperwork is included with the shipment; for Ref Type = 'O': requires a Certificate of Conformance for shipping
- Serial Tracked: If checked, will require entry of QCS Serial Numbers during disposition process.
- Regulation: If the item is regulated, can select the appropriate regulation description from the pull down list (list is generated from QCS Regulations Form)
- First Article: If checked, for Ref Type = 'P': displays an alert message during creation of a QCS Receiver indicating that First Piece testing is required. This alert is informational only.

- MSDS Required: If checked, for Ref Type = 'P': displays an alert message during creation of a QCS Receiver indicating that a Material Safety Data Sheet should be included with the shipment
- Alert: User defined message to be displayed during creation of a QCS Receiver for this item
- Last Audited: User defined
- Planner: User can designate a planner for the item. Pull down list is generated from SyteLine Employees Form. Depending on how parameters are set for the Map Inspector to Receiver field in the QC General Parameters form, this selection will be entered as the default inspector for the item.
- Inspection Frequency: Identifies how often inspection is required. See *Inspection Frequencies* Form Description (page *39*)
- Next Inspect Date: Used for Inspection Frequencies of type 'Date' or 'Days'. Determines next date after which P/O Receipts will be moved into QCS (based on QCS Parameter settings)
- QA Effective Date: Identifies the effective date for when a receiver will be created for the item
- QA Obsolete Date: Identifies the date after which no receiver will be automatically created for the item
- Inspection Break Qty: Used when Inspection Frequency Type = COUNT or FREQUENCY. See *Inspection Frequencies Form Description* (page *39*).
- Days between Inspections: Used when Inspection Frequency Type = DAYS. Number of days between inspections
- Next Inspect Date: If inspection Frequency is set to days this field will show the next inspection date based on the last inspection and the Days Between Inspections entry.

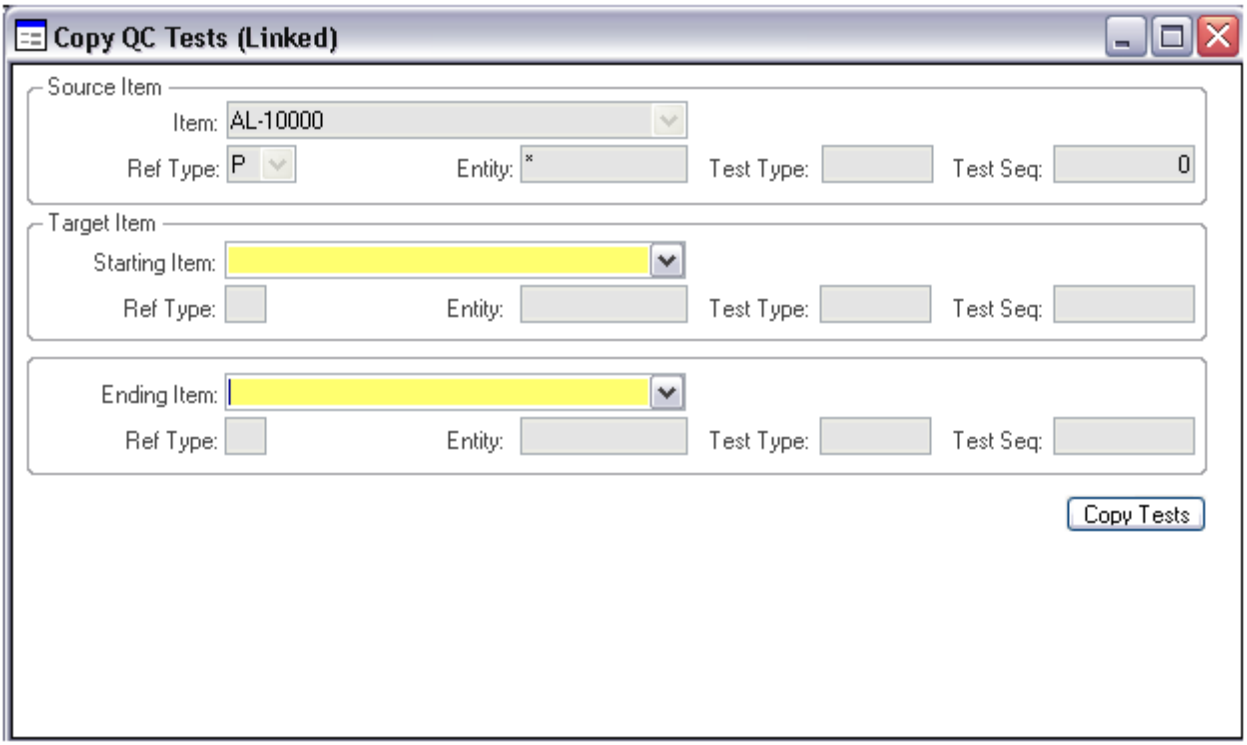
Tests Tab

- View-only list of QCS Item Tests defined for this QCS Item. To add, change, or delete tests: use QC Item Tests (page *53*).

User Defined Tab

- Access to the standard Infor SyteLine 9.00 for QCS 9.00 user defined fields

QC Copy Tests



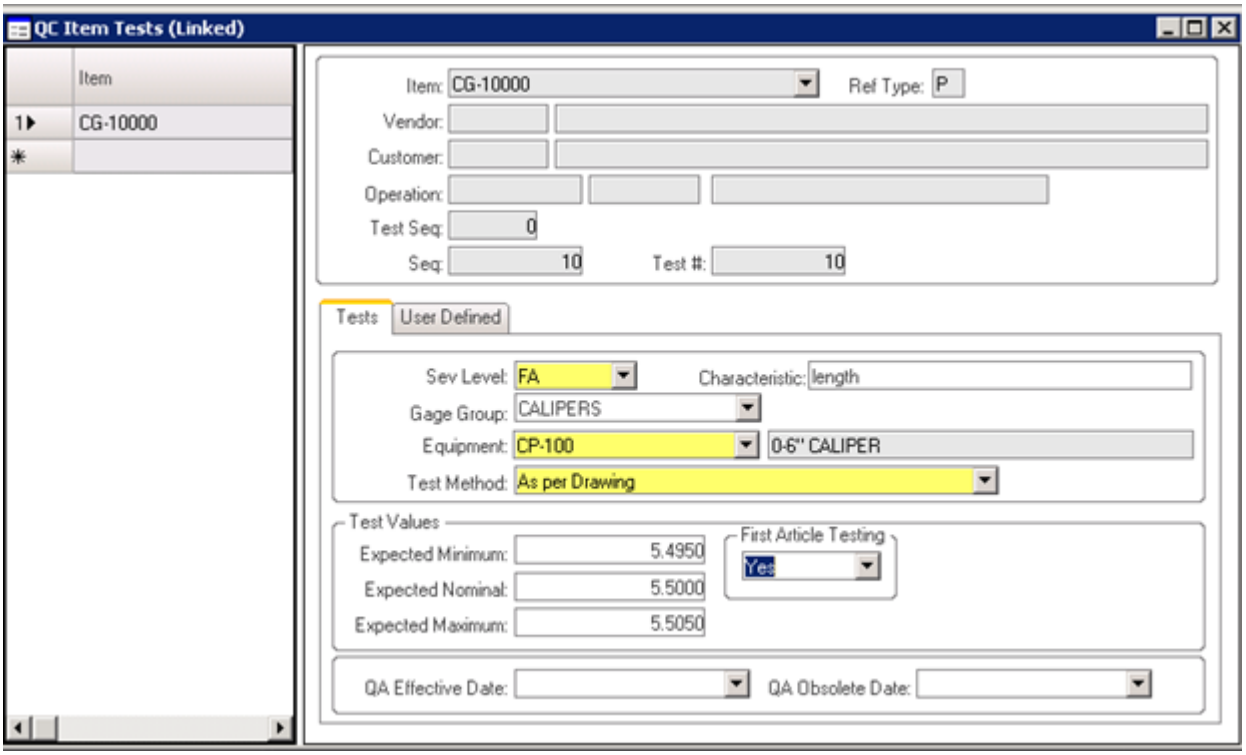
QC Items – Copy Tests button

DESCRIPTION: Function is used to copy QCS Item tests from one QCS Item to another. Form should only be accessed via QC Item. When the form opens, the 'Source Item' information displays based on the current QCS Item.

Field Descriptions:

- Starting Item: Drop-down list will display list of existing QCS Items. Select the item you wish tests copied to. Remaining fields (Ref Type, Entity, Test Type, Test Seq) will display based on the QCS Item selected.
- Ending Item: Drop-down list will display list of existing QCS Items. Select the last item you wish tests copied to. Remaining fields (Ref Type, Entity, Test Type, Test Seq) will display based on the QCS Item selected.
- Copy Tests button: Copies test plan from 'Source' QCS Item to 'Target' QCS Item

QC Item Tests



QC Item Tests

DESCRIPTION: Add, change or delete information regarding tests to be run against this item while it is in QC. This Form does not work stand alone and changes to the tests MUST be made by accessing this form through the QC Item form.

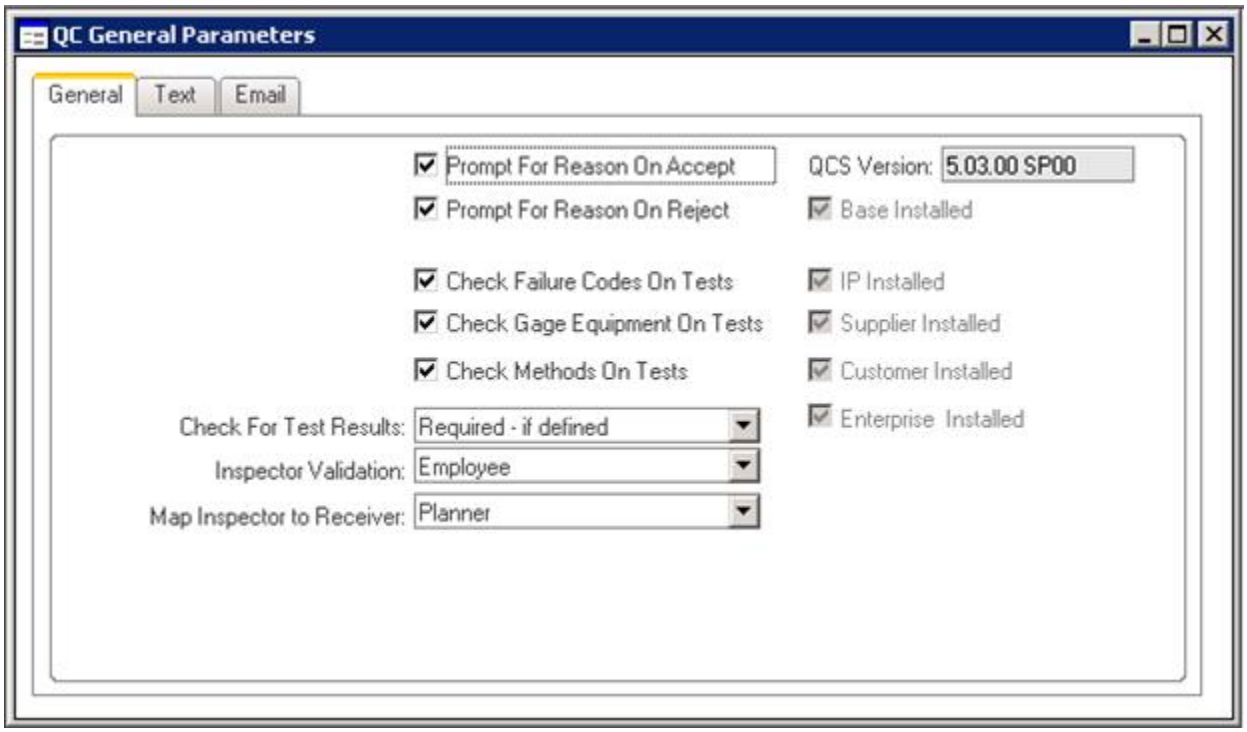
Field Descriptions:

Header

- Displays the currently selected QCS Item detail information. Seq and Test # will default for new records to the next available number for the current item (but can be modified by the user)

- Sev Level: Defines how critical nature of this test. Validates against the Severity Level table (see page *38*)
- Characteristic: Text field to describe test. If additional space is needed, the standard SyteLine notes for this record can be used.
- Gage Group: User can select the Gage Group to be used for this test. Values are from the Gage Groups Form.
- Equipment: Can be a user defined entry determining what tool is required for test, or can be validated against the QC Gages table (see page *45*) based on QCS parameters (see page *55*)
- Test Method: Can be a user defined entry determining how the measurement is made, or can be validated against the QC Methods table (see page *42*) based on QCS parameters (see page *55*).
- Expected Minimum: Minimum value allowed for characteristic within spec
- Expected Nominal: Typical or expected value for characteristic
- Expected Maximum: Maximum value allowed for characteristic within spec
- First Article Testing: This field is used to designate if a specific test is a First Article test (Select YES), a First Article and Standard Test (Select Both) or a Standard test only (Select NO). For more information on First Article Inspection see page *113.*
- QA Effective Date: Date this test will take effect within QCS
- QA Obsolete Date: Date this test will stop being monitored within QCS

QC General Parameters



Codes + Parameters + QC General Parameters

DESCRIPTION: Allows user to edit parameters that apply to all QCS modules

Field Descriptions:
General Tab:

- Prompt for Reason on Accept: If checked, the user will be required to select a valid Accept reason code as part of dispositioning. If not checked, the first Accept Reason for the Ref Type is used and cannot be changed by the user. If more than one Accept Reason Code is created for the Ref Type, this parameter should be checked.
- Prompt for Reason on Reject: If checked, the user will be required to select a valid Reject reason code as part of dispositioning. If not checked, the first Reject Reason for the Ref Type is used and cannot be changed by the user. If more than one Reject reason code is created for the Ref Type, this parameter should be checked.
- Check Failure Codes on Tests: If checked, will ensure that any failure code entered for a test is in the QC Failure Code table. If not checked, allows freeform entry in failure code

- Check Gage Equipment on Tests: If checked, will ensure that any gage/equipment value entered when defining a QC Item Test is in the QC Gage table. If not checked, allows freeform entry in the 'Equipment' field

- Check Methods on Tests: If checked, will validation the QC Item Test 'Test Method' field against the QC Method table. If not checked, allows any entry in the 'Test Method' field.

- Check for Test Results: Select an entry from the pre-defined list (required). The value affects the QC Disposition Receiver form as follows:
  Alert-If Defined: Upon entering the QC Disposition Receiver form, a message will appear if at least one QC Item Test was defined for the item.
  Never: No check for test results or tests defined is performed.
  Required-If Defined: Dispositioning cannot take place unless test results have been defined for the receiver if at least one QC Item Test was defined for the item

- Inspector Validation: Select an entry from the pre-defined list (required). The value affects the QC Disposition Receiver and QC Disposition MRR forms as follows:
  Employee: Requires 'Inspection' field to be a valid SyteLine Employee to disposition.
  None: Inspector field may be blank or freeform entry. NOTE: If a job transaction will be created from the disposition, a valid inspector field IS ALWAYS required

- Map Inspector to Receiver: One of the predefined values must be selected. The value affects the Receiver and Inspection/Disposition forms as follows:

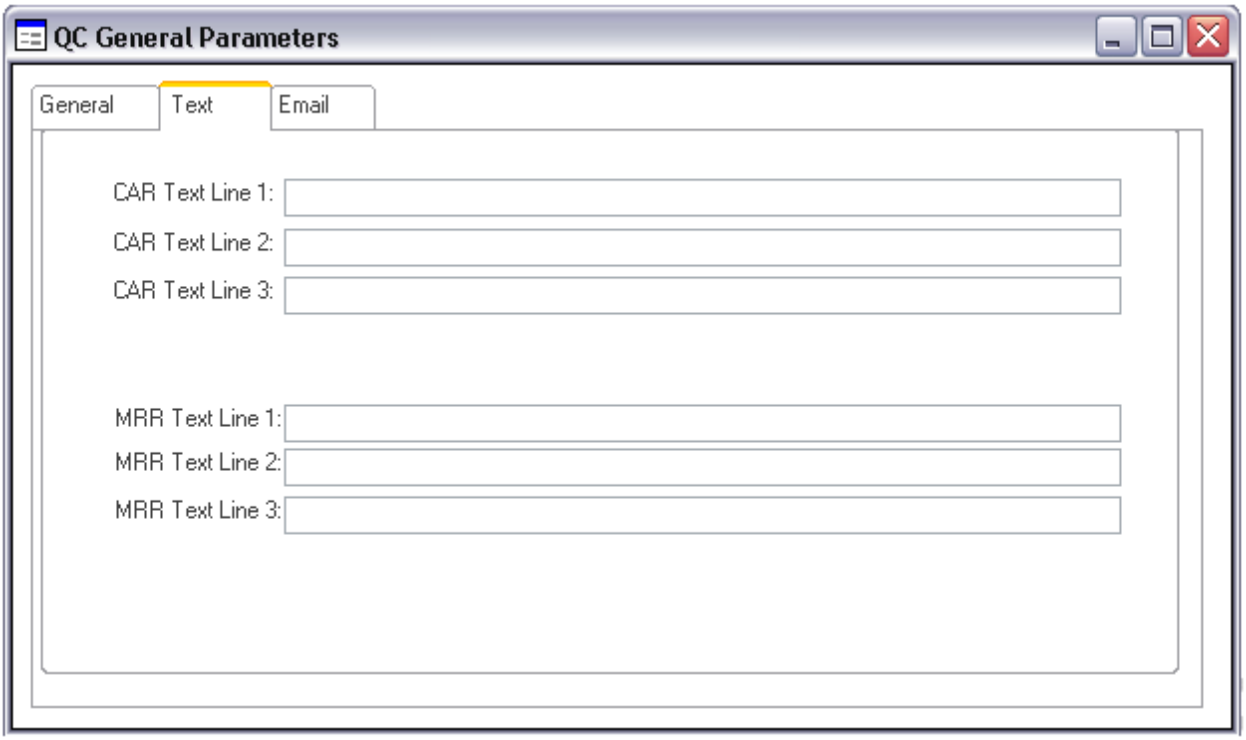
  Planner: The planner that is identified on the QC Items form will automatically be assigned to the Receiver record and will show on the corresponding Inspection/Disposition form

  Current Logged in User: The current logged on user will automatically be assigned to the Receiver record and will show on the corresponding Inspection/Disposition form

  None: No entry will automatically be assigned to the receiver record.

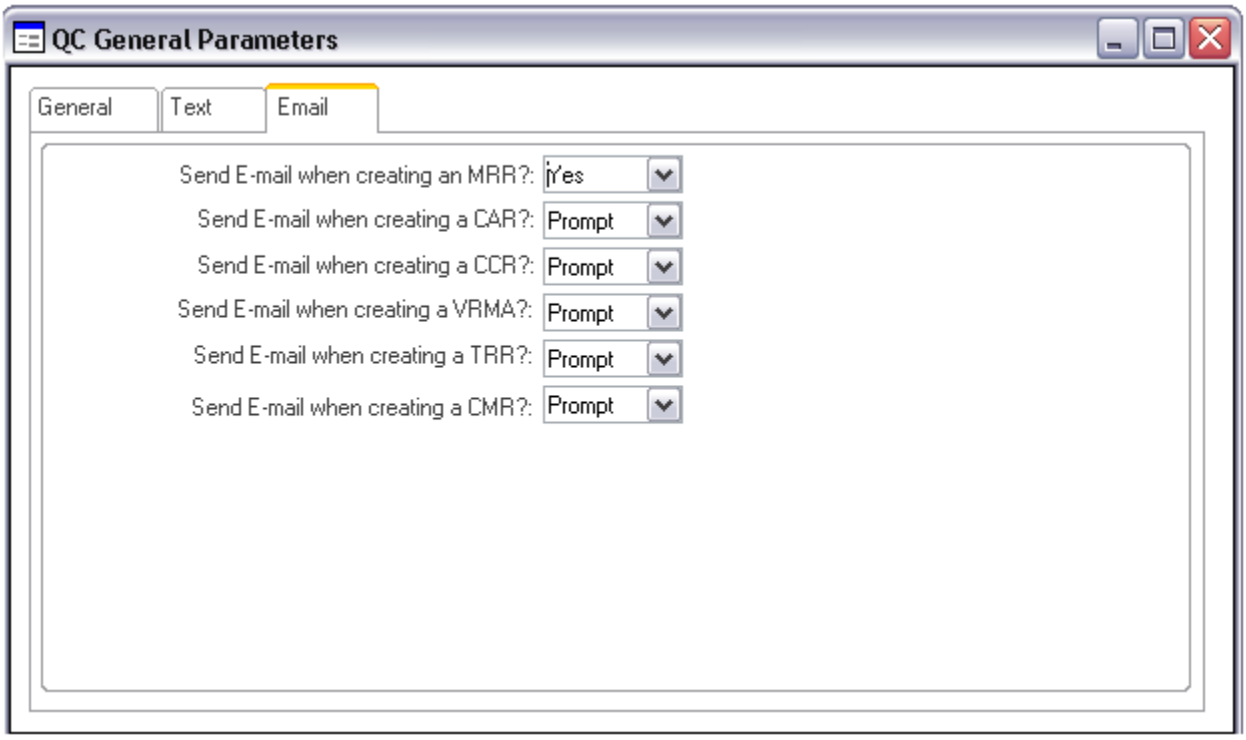
  NOTE: The automatic entry can be changed on the corresponding Inspection/Disposition form.

- QCS Version, Base, IP, Supplier, Customer Installed: based on installed software



Text Tab:

- CAR Text Line 1, 2, 3: Allows user to enter standard text to appear on the CAR Form
- MRR Text Line 1, 2, 3: Allows user to enter standard text to appear on the MRR Form



Email Tab:

The Email functions by triggering an event in the SyteLine Event System.

- Send E-mail notice when creating an MRR? Select one of the pre-defined values (required).
  Prompt: System will ask if you wish to send an e-mail when creating an MRR
  Yes: System will automatically send an e-mail when creating an MRR
  No: System will never send an e-mail when creating an MRR

- Send E-mail notice when creating an CAR? Select one of the pre-defined values (required).
  Prompt: System will ask if you wish to send an e-mail when creating an CAR
  Yes: System will automatically send an e-mail when creating an CAR
  No: System will never send an e-mail when creating an CAR

- Send E-mail notice when creating an CCR? Select one of the pre-defined values (required).
  Prompt: System will ask if you wish to send an e-mail when creating an CCR
  Yes: System will automatically send an e-mail when creating an CCR
  No: System will never send an e-mail when creating an CCR

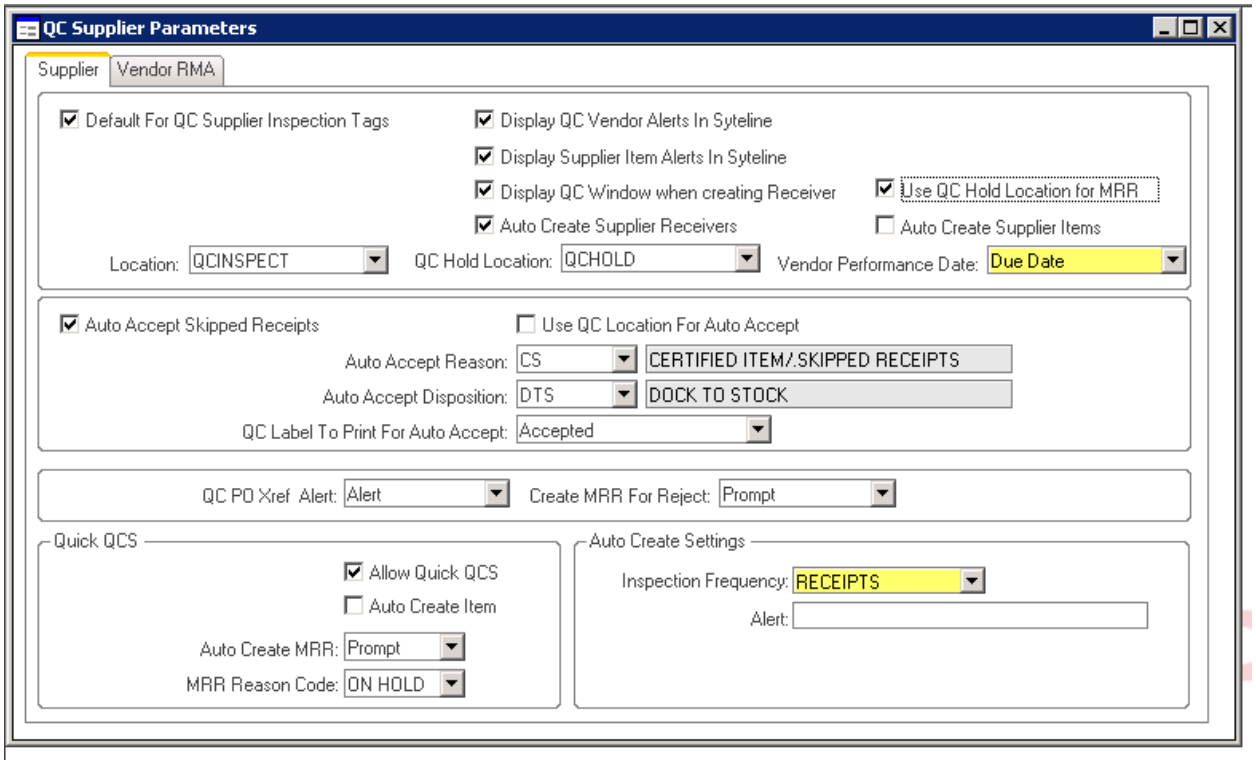
- Send E-mail notice when creating an VRMA? Select one of the pre-defined values (required).
  Prompt: System will ask if you wish to send an e-mail when creating an VRMA

Yes: System will automatically send an e-mail when creating an VRMA
No: System will never send an e-mail when creating an VRMA

- Send E-mail notice when creating a TRR? Select one of the pre-defined values (required).
  Prompt: System will ask if you wish to send an e-mail when creating an TRR
  Yes: System will automatically send an e-mail when creating an TRR
  No: System will never send an e-mail when creating an TRR

- Send E-mail notice when creating an CMR? Select one of the pre-defined values (required).
  Prompt: System will ask if you wish to send an e-mail when creating an CMR
  Yes: System will automatically send an e-mail when creating an CMR
  No: System will never send an e-mail when creating an CMR

QC Supplier Parameters



Codes + Parameters + QC Supplier Parameters – Supplier Tab

Field Descriptions
Supplier Tab:

- Default for QC Supplier Inspection Tags: If checked, the system will automatically print tags when creating a QCS Supplier Receiver, and default 'Print Tags' to yes when the receiver is being dispositioned (when dispositioning, the checkboxes can be changed by the user). If not checked, no 'Receipt' tags will be printed.

- Display QC Vendor Alerts in SyteLine: If checked, the message 'Vendor currently in suspended status' will appear when creating a QCS Supplier Receiver (manually or via PO Receiving) if the QC Vendor's status contains the string 'SUSPEND'. If not checked, no message will display.

- Display Supplier Item Alerts in SyteLine: If checked, the following messages will appear when creating a QCS Supplier Receiver (manually or via PO Receiving) as coded on the QC Item record:
  1) QC Item Alert as defined by the user,
  2) 'Item Requires MSDS'

3) 'First Article Inspection Required'. See page *113* for more details on First Article Inspection,
4) 'C of C is required',
5) Regulation <specific entry that was selected in QC Items shows>.

If not checked, none of these messages will appear

- Display QC Window when creating Receiver: If checked, the QC Supplier Receiver Information form will be displayed after creating a QCS Supplier Receiver (manually or via PO Receiving). This form allows the user to add/change the QC Lot and to add notes to the receiver (via the standard 'Notes' button on the toolbar). If not checked, the form will not be displayed.

- Auto Create Supplier Receivers: If checked, during Purchase Order Receiving, the QC system will check each item received and determine if the item should be moved into QCS based on its Inspection Frequency ID and the SyteLine receiving history for the item. If not checked, no automatic moves into QCS will be performed from PO Receiving.

- Use QC Hold Location for MRR: If checked then the location listed in 'QC Hold Location' on this form will become the default location that items are moved to when a Supplier MRR is created

- QC Location: Only used when 'Auto Create Supplier Receivers' is checked. If not blank, this location overrides the default receipt location for any item being moved into QCS during Purchase Order Receiving. This must be a valid SyteLine location.

- QC Hold Location: Only used when 'Use QC Hold Location for MRR' is checked. If checked the QC Move form will default to this location when an MRR has been created. If not checked then the current location will Auto Create Supplier Receivers' is checked. If not blank, this location overrides the default receipt location for any item being moved into QCS during Purchase Order Receiving. This must be a valid SyteLine location

- Vendor Performance Date: Select an entry from the pre-defined list (required):
  Promise Date: Vendor performance will be calculated using the promise date.
  If promise date is selected and this field is not filled in on the PO then the report will default to the Due Date.
  Due Date: Vendor performance will be calculated using the due date.

- Auto Accept Skipped Receipts: Only used when 'Auto Create Supplier Receivers' is checked. When checked, when Purchase Order Receiving occurs on a QC Item, if the item is not due to go to QC this time, a QC Receiver will still be created, but tagged as all quantity accepted.

This allows all receipts for QC Items to be tracked for QC Vendor Performance reporting. If not checked, QC Receivers will only be created when QC Inspection is required for the item.

- Use QC Location for Auto Accept: Only used when 'Auto Create Supplier Receivers' is checked and 'Auto Accept Skipped Receipts' is checked. When checked, and an Auto-Accepted Receiver is created during Purchase Order Receiving – it will be received into the QC Location (if defined). If not checked, it will use the displayed receipt location.

- Auto Accept Reason: All Auto-Accepted receivers created will use this Accept Reason code. See QC Reason Codes (page *77*)

- Auto Accept Disposition: All Auto-Accepted receivers created will use this Accept Disposition code. See Disposition Codes (page *78*)

- QC Label to Print for Auto Accept: If receipt tags are printing, and an Auto-Accepted receiver is created, this indicates if its tag should print with a status of 'Received' or 'Accepted'.

- QC PO Xref Alert: Select an entry from the pre-defined list (required).
  Alert: If the Purchase Order/Line referenced on a receiver is cross-referenced to a job, during dispositioning, a message will display indicating the Job/Suffix cross-reference.
  None: No alert will display

- Create MRR for Reject: Select an entry from the pre-defined list (required).
  Always: On the QC Disposition Receiver form, when a Reject Quantity is entered for a Supplier Receiver the quantity will be moved to On-Hold and treated as an On-Hold/MRR quantity
  Prompt: On the QC Disposition Receiver form, when a Reject Quantity is entered for a Supplier Receiver, the system will prompt the user if they want to consider the quantity On-Hold/MRR. If yes, the quantity will be treated as On-Hold/MRR quantity, if no, the quantity will remain as a Reject quantity.
  Never: On the QC Disposition Receiver form, reject quantity will have no affect on On-Hold/MRR quantities.

- Allow Quick QCS: If checked, allows Supplier QC Items to be accessed via the QC Quick Receiver/MRR Utility

- Auto Create Item: Only used when 'Allow Quick QCS' is checked. If this is checked, and a user is creating a receiver with the QC Quick Receiver/MRR Utility, if the item is not currently a QCS Item, the user can choose to create it as a QCS Item for Supplier.

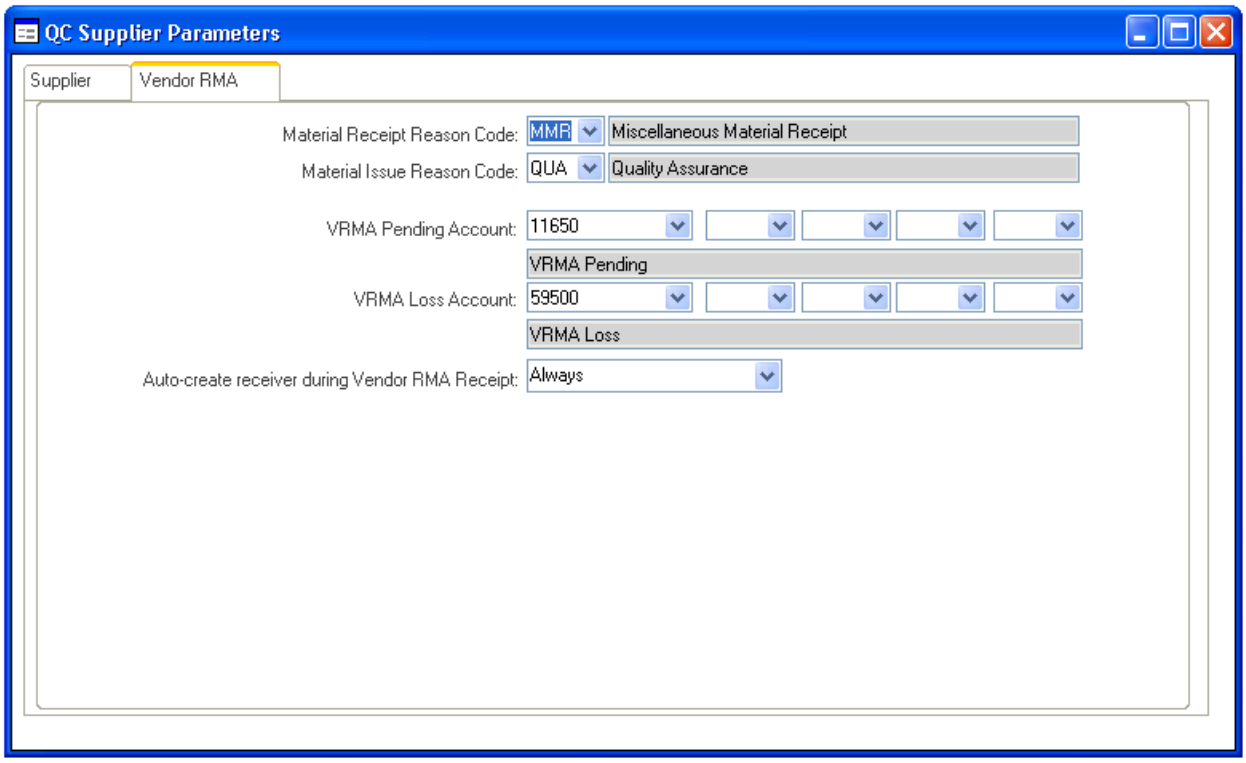
- Auto Create MRR: Only used when 'Allow Quick QCS' is checked. Select an entry from the pre-defined list (required).
  No: When user is creating a Supplier receiver with the QC Quick Receiver/MRR Utility, only a receiver is created.
  Yes: When user is creating a Supplier receiver with the QC Quick Receiver/MRR Utility, the receiver qty will all be placed on hold, and an MRR will be created.
  Prompt: When user is creating a Supplier receiver with the QC Quick Receiver/MRR Utility, the user will be prompted if the quantity should be moved to hold/an MRR should be created.

- MRR Reason Code: Only used when 'Allow Quick QCS' is checked, and Auto-Create MRR is 'Yes' or 'Prompt'. If the QC Quick Receiver/MRR Utility creates an MRR, this value will be used as the reason code for that MRR. See QC Reason Codes (page *77*)

- Inspection Frequency: Only used when 'Auto Create Item' is checked. If a Supplier Item is auto-created, its Inspection Frequency will be set to this value. See Inspection Frequencies (page *39*)

- Alert: Only used when 'Auto Create Item' is checked. If a Supplier Item is auto-created, its 'alert' field will be set to this value.

QC Vendor RMA Parameters



Codes + Parameters + QC Supplier Parameters – Vendor RMA Tab

DESCRIPTION: Allows user to edit parameters that apply to QCS Vendor RMA Processing.

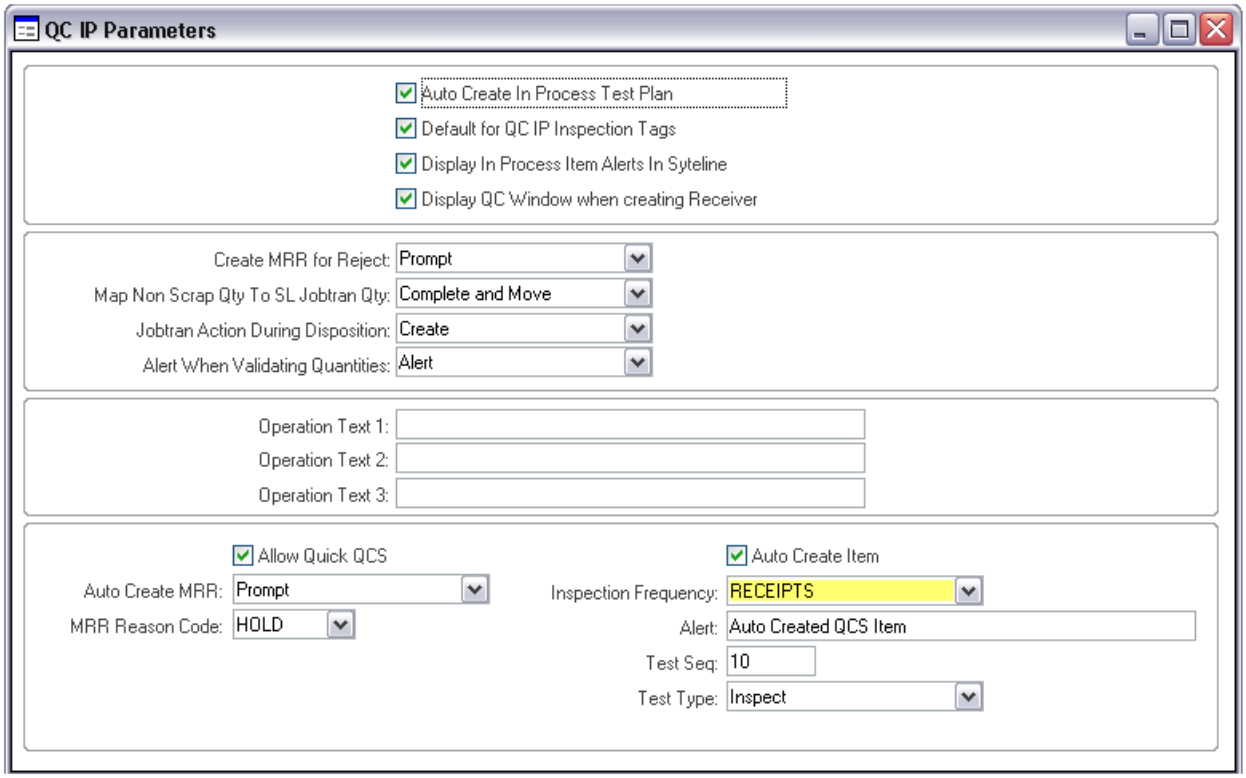
Field Descriptions:

- Material Receipt Reason Code: Select a valid SyteLine Material Receipt Reason Code to be used when receiving material back into stock for a VRMA.
- Material Issue Reason Code: Select a valid SyteLine Material Issue Reason Code to be used when removing material from stock via VRMA scrap or ship.
- Vendor RMA Pending Account: Select a valid SyteLine account number to be used when issuing material out of stock for a VRMA scrap or return, when receiving back from the vendor.
- Vendor RMA Loss Account: Select a valid SyteLine account number to be used when creating a VRMA voucher, for the value difference between the purchase amount and the VRMA pending amount.

- Auto Create Vendor RMA receiver during Vendor RMA Receipt: Select one of the values:

  Always: When a VRMA receipt is performed, a new QCS receiver will always be created.
  Prompt: When a VRMA receipt is performed, a prompt will be displayed to optionally create a QCS receiver.
  Never: VRMA receipt will not create a new QCS receiver

QC IP Parameters



Codes + Parameters + QC IP Parameters

DESCRIPTION: Allows user to edit parameters that apply to the QCS IP module.

Field Descriptions:

- Auto Create In Process Test Plan: If checked, when a Job's status is changed on the Job Orders form, the QC system will check each changed job's item to determine if it should create one or more receivers for that job/item. If not checked, no receivers into QCS will be performed from Job Orders.
- Default for QC IP Inspection Tags: If checked, the system will automatically print tags when creating a QCS In Process Receiver, and default 'Print Tags' to yes when the receiver is being dispositioned (when dispositioning, the checkboxes can be changed by the user). If not checked, no 'Receipt' tags will be printed.

Display In Process Item Alerts in SyteLine: If checked, the following messages will appear when creating a QCS IP Receiver (manually or via Job Orders) if coded on the QC Item record:

1) QC Item Alert as defined by the user,
2) 'Item Requires MSDS',
3) 'First Article Inspection Required',
4) 'C of C is required',
5) Regulation <regulation field from QC Items would display here>. If not checked, none of these messages will appear.

- Display QC Window when creating Receiver: If checked, the QC IP Receiver Information form will be displayed after creating a QCS IP Receiver (manually or via Job Orders). This form allows the user to add/change the QC Lot and to add notes to the receiver (via the standard 'Notes' button on the toolbar). If not checked, the form will not be displayed.

- Create MRR for Reject: Select an entry from the pre-defined list (required).
  Always: On the QC Disposition Receiver form, when a Reject Quantity is entered for an In Process Receiver, the quantity will be moved to On-Hold and treated as an On-Hold/MRR quantity.
  Prompt: On the QC Disposition Receiver form, when a Reject Quantity is entered for an In Process Receiver, the system will prompt the user if they want to consider the quantity On-Hold/MRR. If yes, the quantity will be treated as On-Hold/MRR quantity, if no the quantity will remain as a Reject quantity.
  Never: On the QC Disposition Receiver form, reject quantity will have no affect on On-Hold/MRR quantities

- Map Non Scrap Qty to SL Jobtran Qty: Only used when 'Jobtran Action During Disposition' = CREATE. Select one of the values:
  Complete: Jobtran Qty Complete is set = Total Quantity Accepted + Rejected
  Complete and Move: Jobtran Qty Complete AND Jobtran Qty Move are set = Total Quantity Accepted + Rejected
  Move: Jobtran Qty Moved is set = Total Quantity Accepted + Rejected - Scrap Quantity
  None: No quantity is set on the job transaction

- Jobtran Action During Disposition: Select one of the values:
  Create: Create a SyteLine unposted job transaction for this operation (requires a valid employee number in the Inspector field)
  None: No SyteLine unposted job transaction is created

- Alert When Validating Quantities: Select one of the values:
  Alert: A message will display if the quantities dispositioned are greater than what has been moved into the job operation.
  None: No check is made against operation quantities.
  Required: The user will not be able to disposition more at an operation than has been moved into that operation.

- Operation Text 1, 2, 3: Data entered will display on the Outside Paperwork Report

- Allow Quick QCS: If checked, allows In Process QC Items to be accessed via the QC Quick Receiver/MRR Utility.

- Auto Create MRR: Only used when 'Allow Quick QCS' is checked. Select an entry from the pre-defined list (required):
  No: When user is creating an In Process receiver with the QC Quick Receiver/MRR Utility, only a receiver is created.
  Yes: When user is creating an In Process receiver with the QC Quick Receiver/MRR Utility, the receiver qty will all be placed on hold, and an MRR will be created.
  Prompt: When user is creating an In Process receiver with the QC Quick Receiver/MRR Utility, the user will be prompted if the quantity should be moved to hold/an MRR should be created

- MRR Reason Code: Only used when 'Allow Quick QCS' is checked, and Auto-Create MRR is 'Yes' or 'Prompt'. If the QC Quick Receiver/MRR Utility creates an MRR, this value will be used as the reason code for that MRR. See QC Reason Codes (page *77*)

- Auto Create Item: Only used when 'Allow Quick QCS' is checked. If this is checked, and a user is creating a receiver with the QC Quick Receiver/MRR Utility, if the item is not currently a QCS Item, the user can choose to create it as a QCS Item for In Process.

- Inspection Frequency: Only used when 'Auto Create Item' is checked. If an In Process Item is auto-created, its Inspection Frequency will be set to this value.

- Alert: Only used when 'Auto Create Item' is checked. If an In Process Item is auto-created, its 'alert' field will be set to this value.

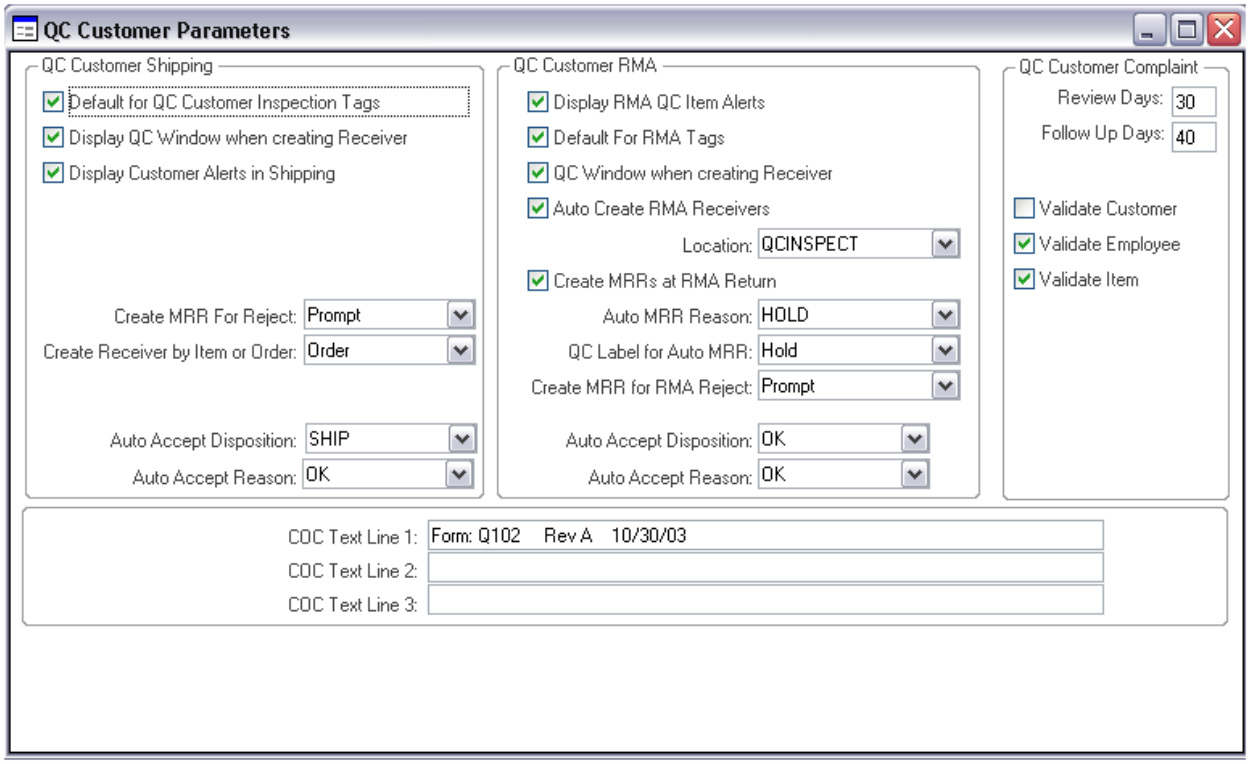
- Test Seq: Only used when 'Auto Create Item' is checked. If an In Process Item is auto-created, its 'Test Seq' field will be set to this value.

- Test Type: Only used when 'Auto Create Item' is checked. If an In Process Item is auto-created, its 'Test Type' field will be set to this value.

Notes:

1) **Jobtran processing eliminates the need to enter both a QCS disposition and create a Job Transaction.**
2) **QCS Job Transactions do not support the following:**
    - **Move a quantity to inventory via job transaction**
    - **Record Production Schedule quantity complete**
    - **Record Jobs linked with Projects**
    - **Mark a job as complete**
    - **Co-Product production reporting**

QC Customer Parameters



Codes +Parameters + QC Customer Parameters

DESCRIPTION: Allows user to edit parameters that apply to the QCS Customer/RMA module.

Field Descriptions:

QC Customer Shipping

- Default for QC Customer Inspection Tags: If checked, the system will automatically print tags when creating a QCS Customer Receiver, and default 'Print Tags' to yes when the receiver is being dispositioned (when dispositioning, the checkboxes can be changed by the user). If not checked, no 'Receipt' tags will be printed.
- Display QC Window when creating Receiver: If checked, the QC Customer Receiver Information form will be displayed when creating a QCS Customer Receiver.

  This form allows the user to add/change the QC Lot and to add notes to the receiver (via the standard 'Notes' button on the toolbar). If not checked, the form will not be displayed.

- Display Customer Alerts in Shipping: If checked, the following messages will appear when creating a QCS Customer Receiver if coded on the QC Item record:

    1) C Item Alert as defined by the user,
    2) 'Item Requires MSDS',
    3) 'First Article Inspection Required',
    4) 'C of C is required',
    5) Regulation <regulation field from QC Items would display here>. If not checked, none of these messages will appear.

- Create MRR for Reject: Select an entry from the pre-defined list (required).
  Always: On the QC Disposition Receiver form, when a Reject Quantity is entered for a Customer Receiver, the quantity will be moved to On-Hold and be treated as an MRR quantity.
  Prompt: On the QC Disposition Receiver form, when a Reject Quantity is entered for a Customer Receiver, the system will prompt the user if they want to consider the quantity On-Hold/MRR. If yes, the quantity will be treated as On-Hold/MRR quantity, if no, the quantity will remain as a Reject quantity.
  Never: On the QC Disposition Receiver form, reject quantity will have no affect on On-Hold/MRR quantities.

- Create Receiver by Item or Order; Select one of the values:
  Item: When creating a new receiver, the user is prompted for item number - the order/line cross-reference is not required.
  Order: When creating a new receiver, the user is prompted for the order/line/release.

- Auto Accept Disposition: Select an entry from the list maintained in the QC Disposition Codes table. This selection will automatically be entered as the disposition code for items auto accepted.

- Auto Accept Reason: Select an entry from the list maintained in the QC Reason Codes table. This selection will automatically be entered as the reason code for items auto accepted.

QC Customer RMA

- Display RMA QC Item Alerts: If checked, the following messages can be set to appear when creating a QCS Customer Receiver if coded on the QC Item record: 1) QC Item Alert as defined by the user, 2) 'Item Requires MSDS', 3) 'First Article Inspection Required', 4) 'C of C is required', 5) Regulation <regulation field from QC Items would display here>. If not checked, none of these messages will appear.

- Default for RMA Tags: If checked, the system will automatically print tags when creating a QCS RMA Receiver, and default 'Print Tags' to yes when the receiver is being dispositioned (when dispositioning, the checkboxes can be changed by the user). If not checked, no 'Receipt' tags will be printed.

- QC Window when creating Receiver: If checked, the QC Customer Receiver Information form will be displayed after creating a QCS RMA Receiver (manually or via RMA Return Transaction). This form allows the user to add/change the QC Lot and to add notes to the receiver (via the standard 'Notes' button on the toolbar). If not checked, the form will not be displayed.

- Auto Create RMA Receivers: If checked, during SL RMA Return Transaction, the QC system will check create a receiver if the Item (or Item/Customer combination) is eligible for QCS.

- Location: Only used when 'Auto Create RMA Receivers' is checked. If not blank, this location overrides the default receipt location for any item being moved into QCS during RMA Return Transaction. This must be a valid SyteLine location.

- Create MRRs at RMA Return: If checked, when an RMA Return transaction is processed for a QCS item, the quantity will be moved to On-Hold and an MRR will be created for the entire quantity.

- Auto MRR Reason: If a receiver is automatically created and 'Create MRRs at RMA Return' is checked, the MRR will be set with this reason code.

- QC Label for Auto MRR: If 'Create MRRs at RMA Return' and 'Default for RMA Tags' are both checked, this indicates if the tags printed will show with a status of RECEIVED or QCHOLD.

- Create MRR for RMA Reject: Select an entry from the pre-defined list (required).
  Always: On the QC Disposition Receiver form, when a Reject Quantity is entered for an RMA Receiver, the quantity will be moved to On-Hold and treated as an On-Hold/MRR quantity.
  Prompt: On the QC Disposition Receiver form, when a Reject Quantity is entered for an RMA Receiver, the system will prompt the user if they want to consider the quantity On-Hold/MRR. If yes, the quantity will be treated as On-Hold/MRR quantity, if no, the quantity will remain as a Reject quantity.
  Never: On the QC Disposition Receiver form: reject quantity will have no affect on On-Hold/MRR quantities.

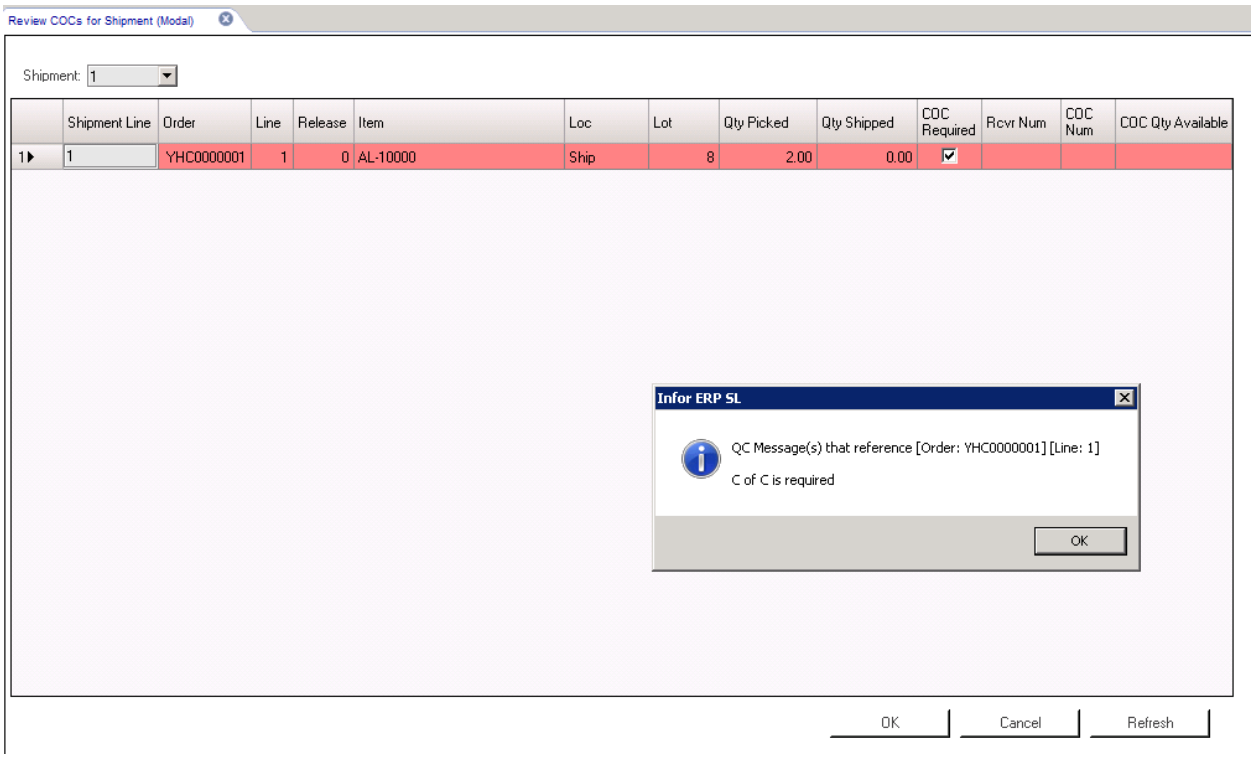
- Auto Accept Disposition: Select an entry from the list maintained in the QC Disposition Codes table. This selection will automatically be entered as the disposition code for items auto accepted.

- Auto Accept Reason: Select an entry from the list maintained in the QC Reason Codes table. This selection will automatically be entered as the reason code for items auto accepted.

QC Customer Complaint

- Review Days: Used to calculate the Projected Review Date from the CCR Create date
- Follow up Days: Used to Calculate the Projected Follow-up Due Date
- Validate Customer: If checked, the Company/Customer information from the CCR will be derived from the Customer Master. The address, email, fax, phone, contact information can be overridden with the values specific for a CCR.
- Validate Employee: If checked, the originator field of the CCR must come from the employee master. **NOTE:** The resolver and coordinator fields are always free form text.
- Validate Item: If checked, only items from the SyteLine Item master can be entered. If not selected, the CCR Item field is a free form text field.
- COC Text Line 1,2,3: Standard text that will appear on the bottom of the Certificate of Conformance Report

Review COCs for Shipment



Review COCs for Shipment

DESCRIPTION: The fields on this form are all read-only. This form opens when the status on the Shipment Master form is changed from Open to Ready to Ship. The form displays the shipment lines and pertinent QCS information for the shipment being set to Ready to Ship. Click the OK button to validate that all the lines being shipped have sufficient COC quantity available for all lines requiring QCS COCs. If there are any lines with insufficient COC quantity available, an error message is displayed, and the status is changed back to Open on the Shipment Master form. If all lines requiring QCS COCs have sufficient quantities available, the Quantity Shipped field is updated, and the form saves the status change.

Data is populated in the grid depending on which shipment number displays in the read-only Shipment field. Lines that have sufficient QCS quantity available or lines that do not require QCS are highlighted green. Lines requiring QCS but do not have a sufficient quantity show are highlighted red.

All fields in the grid are read-only.

The form includes a refresh button. You would use that button if you have not tied the receiver or COC to the shipment. You can right-click on Rcvr Num and choose Details to find the receiver and link it to the shipment/line. Then click the refresh button to update the fields.

Using the Review COCs for Shipment form as part of the Pick, Pack, Ship functionality

This is an example of how you use this form along with others as part of the Pick, Pack, Ship functionality. You can not use this functionality in conjunction with standard order shipping. If you try, you will get an error. The steps below show how this works.

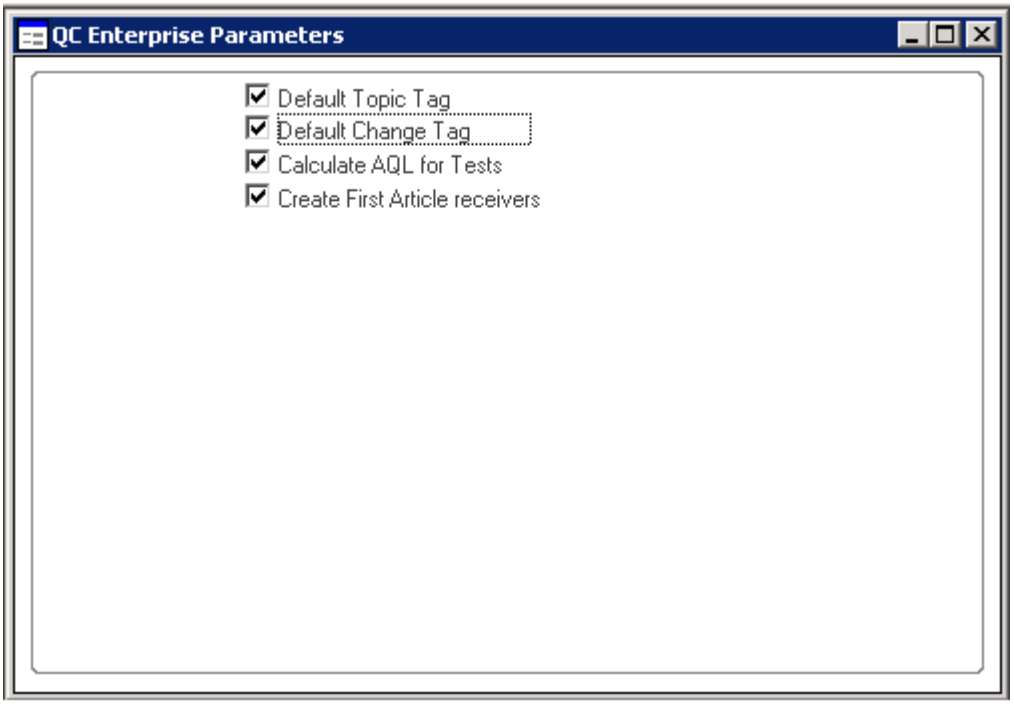
1. Create two orders, one with a QCS item requiring QCS, and one with an item that does not require QCS.
2. Use Pick Workbench to create a pick list for both orders.
3. Use Pick Confirmation to complete the pick list.
4. Create a new shipment on the Shipment Master form. Save, and then try setting the status to Ready To Ship. This opens the Review COCs for Shipment form. Error messages display for the first two lines because the required QCS activity has not been performed. Lines in green either do not need QCS, or have the QCS COC quantity available.
5. Click OK to get rid of the message.
6. Click Cancel on the Review COCs for Shipment form. You are returned to the Shipment Master form. The status on the Shipment Master form is now set to Open.
7. Create a QCS receiver for the order that requires QCS on the QC Create Customer Receiver form.
8. Accept the quantity. This creates the COC.
9. On the QC CO Inspect/Disposition form, link the receiver to the shipment and line. You can only assign a shipment and line to one receiver.
10. Try to change the shipment status again on the Shipment Master form to Ready to Ship. An error message appears again, but this time there is a receiver number in the Rcvr Num column.

11. Now, print the COC to make the quantity available, and try changing the status again. You still get the same error messages. This is because, in order to prevent you from shipping using a mix of Order Shipping and Pick, Pack, Ship, you must tie the COC to a shipment and line.
12. This step is optional. If you have tied the receiver to a shipment/line but not the COC, you can save a small step here. Right-click on the Rcvr Num column. Choose Details. This takes you to the QCS CO Inspect/Disposition form, filtered on the Rcvr Num. From here, you can click the COCs button to go to the COC and fill in the shipment and line. After closing out of those windows, you can use the Refresh button to update the form.
13. Change the status again on the Shipment Master form. All lines on the Review COCs for Shipment form are green, and the COC Num and Quantity Available are both filled in.
14. Click OK. The Review COCs for Shipment form closes, and the status is set to Ready to Ship on the Shipment Master form.
15. On the QC COCs form, refresh the COC, and you will see that the Quantity Shipped field has been updated.
16. If you want, you can now change the status on the Shipment Master form back to Open. If you do that, the Quantity Shipped field on the QC COCs form is updated (backed out).

Note: The normal QCS Order shipping process allows for multiple receivers per order, and multiple COCs per receiver. For Pick, Pack, Ship, there is a limit of one receiver per order and one COC per receiver. Both must be tied to the same shipment\line combo. If you need to add to a receiver, you can use the QC Receiver Update Utility form to increment a receiver.

If you are using Pick, Pack, Ship and not dispositioning the whole receiver at once, you must append to the COC tied to the shipment/line. To do this, clear the New COC check box on the QC CO Inspect/Disposition form, and select the existing COC when dispositioning.

QC Enterprise Parameters



Codes +Parameters + QC Enterprise Parameters

DESCRIPTION: Allows user to edit parameters that apply to the QCS Enterprise module.

Field Descriptions:

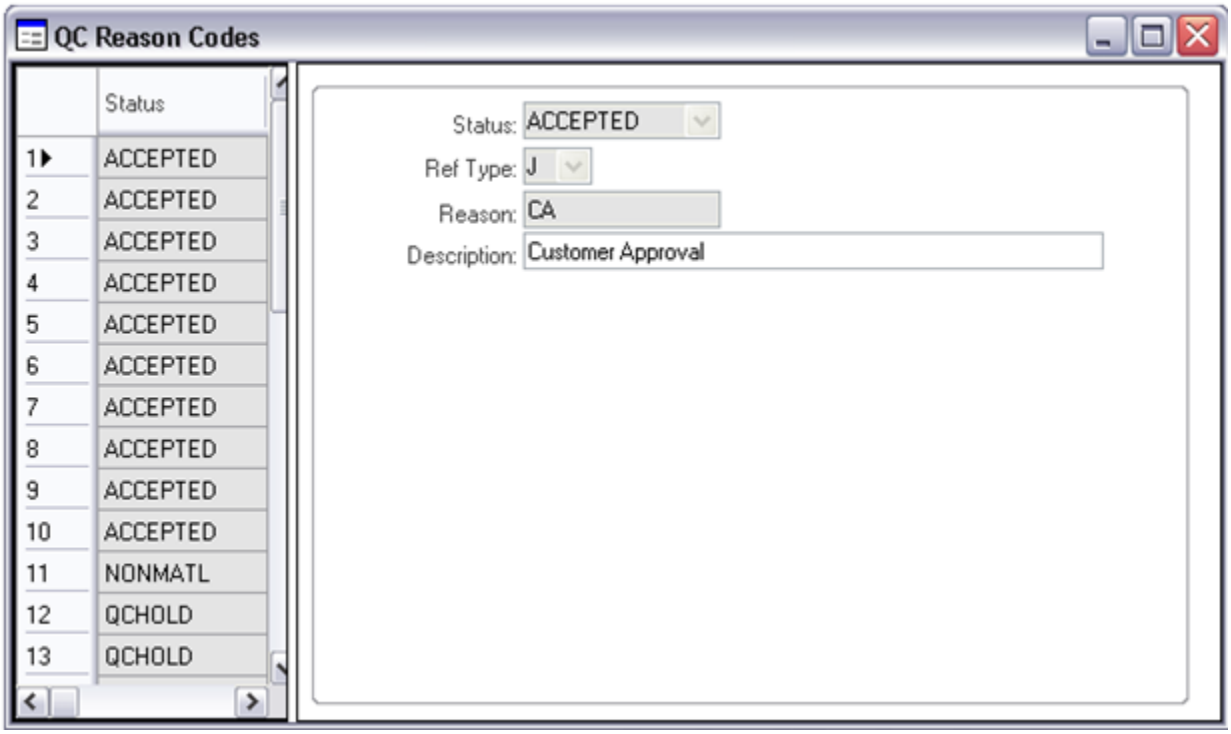
QC Enterprise Parameters

- Default for QC Default Topic Tag: If checked, the system will automatically print tags when creating a QCS Topic Receiver, and default 'Print Tags' to yes when the receiver is being managed (when dispositioning, the checkboxes can be changed by the user). If not checked, no 'Topic' tags will be printed.
- Default for QC Default Change Tag: If checked, the system will automatically print tags when creating a QCS Change Receiver, and default 'Print Tags' to yes when the receiver is being managed (when dispositioning, the checkboxes can be changed by the user). If not checked, no 'Change' tags will be printed.
- Calculate AQL for Tests: If checked, the system will automatically calculate a test size for Supplier and In-Process Recording of test results based on the QC Sampling Criterias Form and the QC Test Plan Sampling Rates Form (see page 99)

- Create First Article receivers: If checked, and the First Article is checked on the QC Items then a first article receiver will be created for the item. For more information on First Article Receiver see page 113.

QC Codes and Various Forms

QC Reason Codes



QC Reason Codes

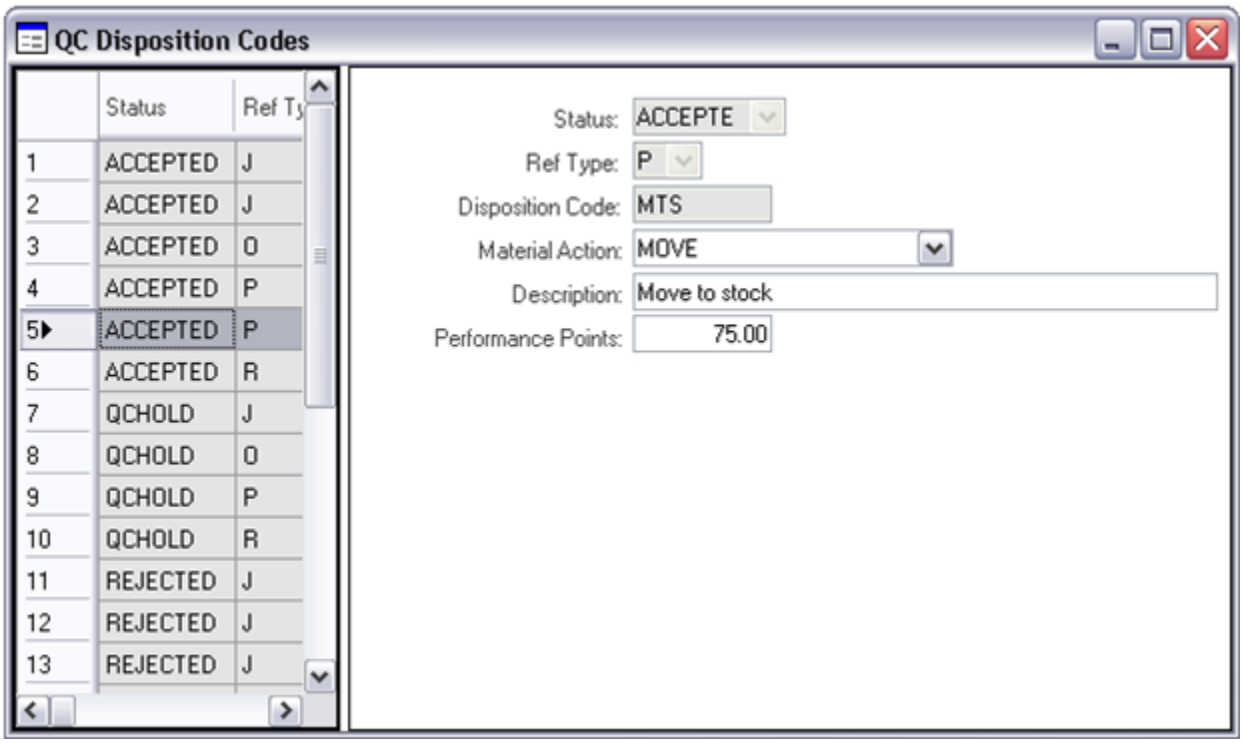
DESCRIPTION: Allows user to add, change or delete reason codes for all QCS Ref Types. Reason codes are referenced during dispositioning. At least one reason code should be set up for Accepted, Rejected and QCHold for each module running (Supplier, In Process, Customer, RMA). Reason codes define why a receipt is being accepted, rejected or marked on-hold. Typical entries: Accepted: OK Per Spec; Rejected: BRK Broken; QCHOLD: MRB Awaiting decision from MRB

Field Descriptions:

- Status: Select valid entry from list: Accepted, Rejected, QCHold

- Ref Type: P(urchased)/Supplier, J(ob)/In Process, O(rder)/Customer, R(MA)/Customer
- Reason: User defined unique code for this Status/Ref Type
- Description: User defined

QC Disposition Codes



QC Disposition Codes

DESCRIPTION: Allows user to add, change or delete disposition codes for all QCS Ref Types. Disposition codes are referenced during dispositioning to indicate what will be done with these pieces (and, for Purchasing/Supplier – how the receipt is to be ranked for the Vendor Performance Report). At least one disposition code should be set up for ACCEPTED, REJECTED, QCHOLD for each module running (Supplier, In Process, Customer, RMA).

Field Descriptions:

- Status: Select valid entry from list: Accepted, Rejected, QCHold
- Ref Type: P(urchased)/Supplier, J(ob)/In Process, O(rder)/Customer, R(MA)/Customer
- Disposition: User defined unique code for this Status/Ref Type

- Material Action: Select one of the values, or leave blank**. This applies to Ref Type = 'P', Ref Type ='R' and Ref Type 'O' only. This should only be used when QCS Processing is against items in SyteLine inventory.**
  Issue: If a quantity is dispositioned to this code, a SyteLine Miscellaneous Issue form will display for that quantity.
  Move: If a quantity is dispositioned to this code, a SyteLine Quantity Move form will display for that quantity.

- Description: User defined

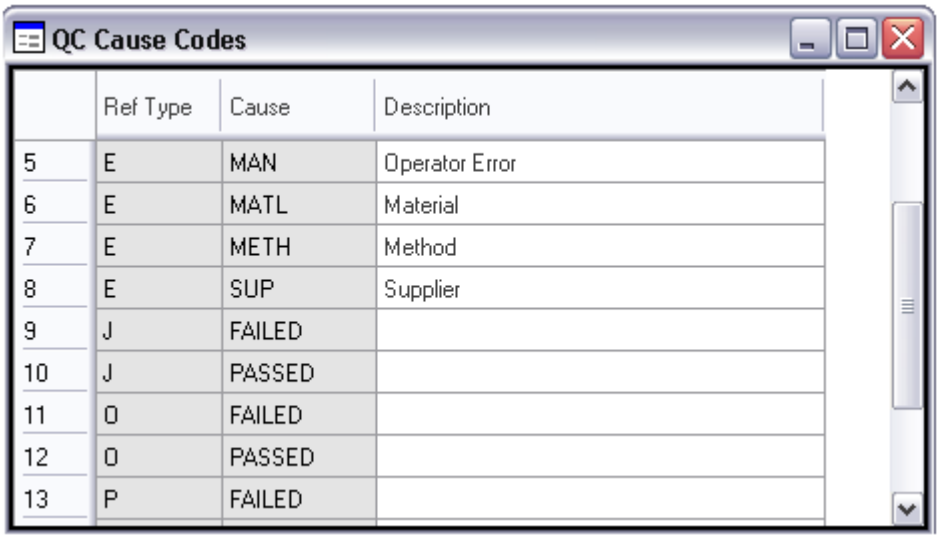
- Performance Points: Value to use for Vendor Performance reporting for the quantity dispositioned with this code. Applicable for Ref type 'P' only.

Notes:

1) **Performance points for item quality are based on the quantity and the points from the disposition code. For example: 75 points may be assigned for: Status = ACCEPTED, Ref Type = P, Disposition = MTS (for Move to Stock). Fewer points can be assigned for situations where the parts are not perfect, but they can be used: Status = ACCEPTED, Ref Type = P, Disposition = UAI (for Use As Is).**

2) **It is recommended that a disposition code be set up at full points for situations where the parts cannot be used, but it was not the vendor's fault (e.g. Destroyed in Testing – but the parts passed the test). This will help ensure accurate Vendor Performance Reporting.**

QC Cause Codes



	Ref Type	Cause	Description
5	E	MAN	Operator Error
6	E	MATL	Material
7	E	METH	Method
8	E	SUP	Supplier
9	J	FAILED	
10	J	PASSED	
11	O	FAILED	
12	O	PASSED	
13	P	FAILED	

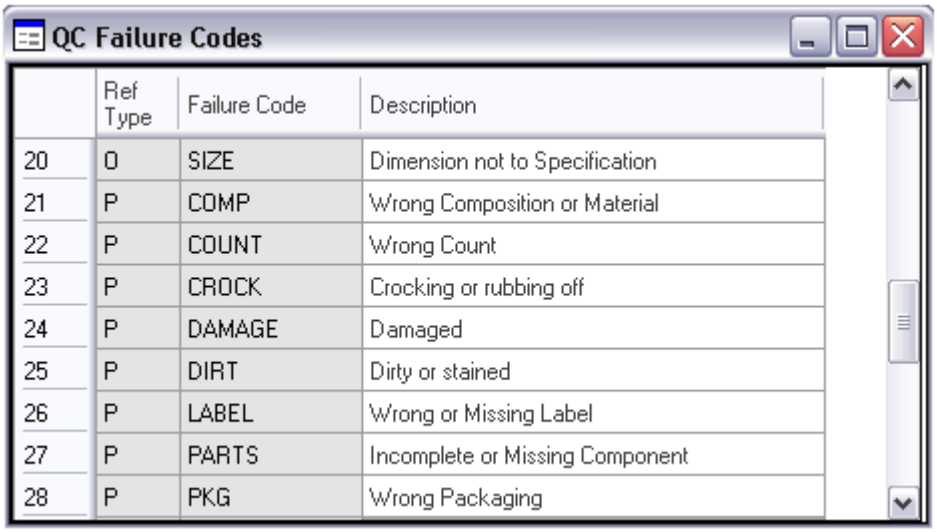
QC Cause Codes

DESCRIPTION: Allows user to add, change or delete cause codes for all QCS Ref Types. Cause codes are referenced for rejected quantities during dispositioning and on the MRR form. At least one cause code should be set up for each module running (Supplier, In Process, Customer, RMA). Cause codes are optional, but can be used to describe the underlying cause for the rejection of material - the root of the problem (for example: Poor Documentation, Lack of Training, Poor Process Control).

Field Descriptions:

- Ref Type: P(urchased)/Supplier, J(ob)/In Process, O(rder)/Customer, R(MA)/Customer, E(nterprise)
- Cause: User defined unique code for this Ref Type
- Description: User defined

QC Failure Codes



	Ref Type	Failure Code	Description
20	O	SIZE	Dimension not to Specification
21	P	COMP	Wrong Composition or Material
22	P	COUNT	Wrong Count
23	P	CROCK	Crocking or rubbing off
24	P	DAMAGE	Damaged
25	P	DIRT	Dirty or stained
26	P	LABEL	Wrong or Missing Label
27	P	PARTS	Incomplete or Missing Component
28	P	PKG	Wrong Packaging

QC Failure Codes

DESCRIPTION: Allows user to add, change or delete failure codes for all QCS Ref Types. Failure codes can be used to describe the problem with a part, or to describe what caused the problem with a part (for example: Broken, Poor Finish, Wrong Color, Operator Error, Machine Error, Process Error). Failure codes are associated with a receiver from the QC Test Results Entry (Linked) form (inspection results). Failure codes are optional.

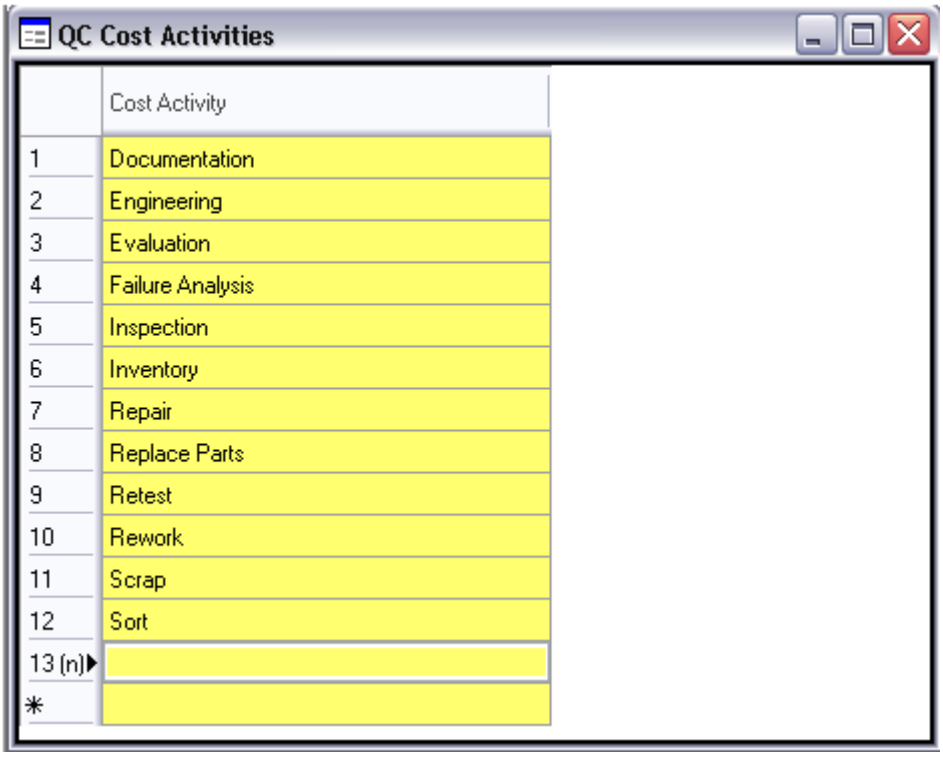
Field Descriptions:

- Ref Type: P(urchased)/Supplier, J(ob)/In Process, O(rder)/Customer, R(eturn)/Customer, E(nterprise)
- Failure Code: User defined unique code for this Ref Type
- Description: User defined

Note:

1) **The use of the Failure Code Table is determined by the QC General Parameters. If the failure codes will not be checked, the user is allowed to enter any value for a failure code - there is no checking for consistency in spelling, coding, etc. Since there is no description for a failure code added on the fly, any reports or forms showing those codes will show the code only. If the failure codes will be checked, the value must be on the Failure Code Table prior to being used, and forms and reports will display the code and its description**.

QC Cost Activities

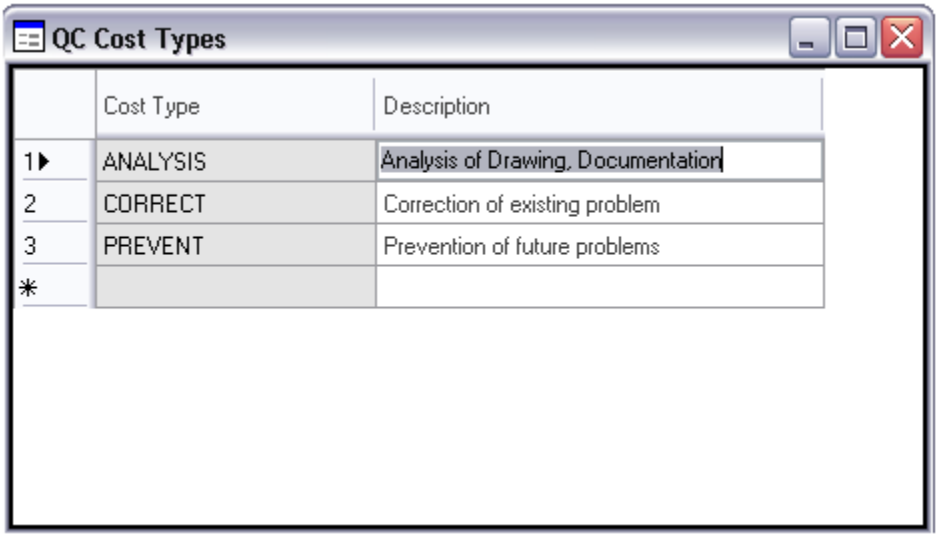


QC Cost Activities

DESCRIPTION: Allows user to add, change or delete Cost Activities. Codes are used when identifying costs typically associated with MRRs and CARs (for example: Rework, Redesign, Product Acceptance, Test. At least one activity code must be created if costs will be assigned to MRRs, CARs, TRRs or CMRs.

Field Descriptions:

- Cost Activity: User defined unique code



QC Cost Types

DESCRIPTION: Allows user to add, change or delete Cost Types. Codes are used when identifying costs associated with MRRs and CARs (for example: Analysis, Correction, Prevention, Implementation, Solution, Failure-Internal, Failure-External). At least one type must be created if costs will be assigned to MRRs, CARs, TRRs or CMRs.

Field Descriptions:

- Cost Type: User defined unique code
- Description: Description of the cost type

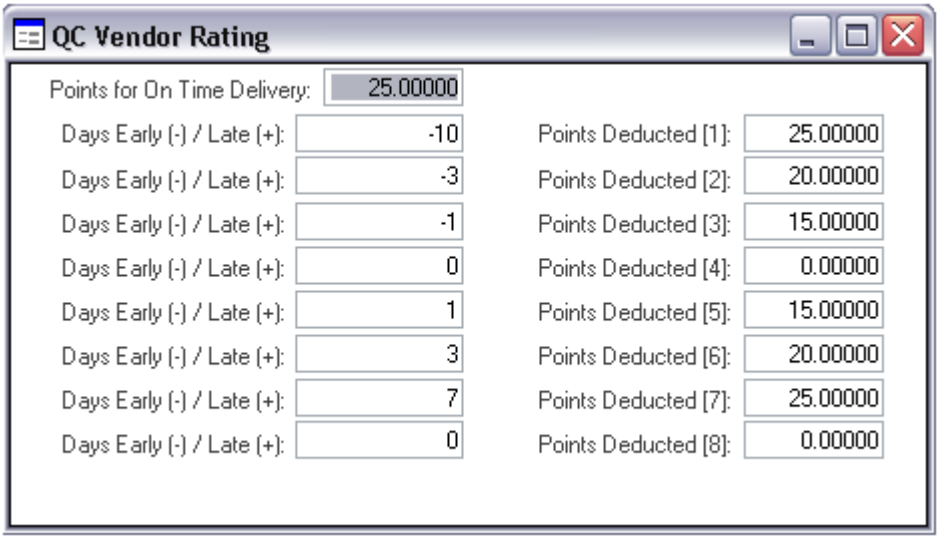
Typical Cost of Quality Definitions:

Prevention Costs: Any cost associated with the prevention of quality problems, such as: Engineering Process Planning, Quality Planning, Design Review, Contract Review, Product Qualification, Supplier Evaluation/Selection, Tool Control, Training, Quality Audits, Preventative Maintenance, Failure Analysis, Redesign, and Safety Programs.

Appraisal Costs: Any cost incurred while conducting inspections, tests, or other evaluations implemented to determine conformance to the quality requirements of the produced hardware, software, or services.

Failure Costs: Any costs incurred to correct a nonconformance as well as the evaluations, dispositions and consumer affairs aspects of such failures. These include: consumer affairs, engineering and purchasing change orders, rework, scrap, warranty, product liability, field service, and inspection.

QC Vendor Rating Parameters



QC Vendor Rating

DESCRIPTION: Allows user to define Vendor Performance scoring for delivery. This will be used for QC Vendors in the Vendor Performance Report. The above example shows 25 points being the highest value for delivery, with adjustments as shown for number of days late, on time (Days Early/Late = 0), and days early.

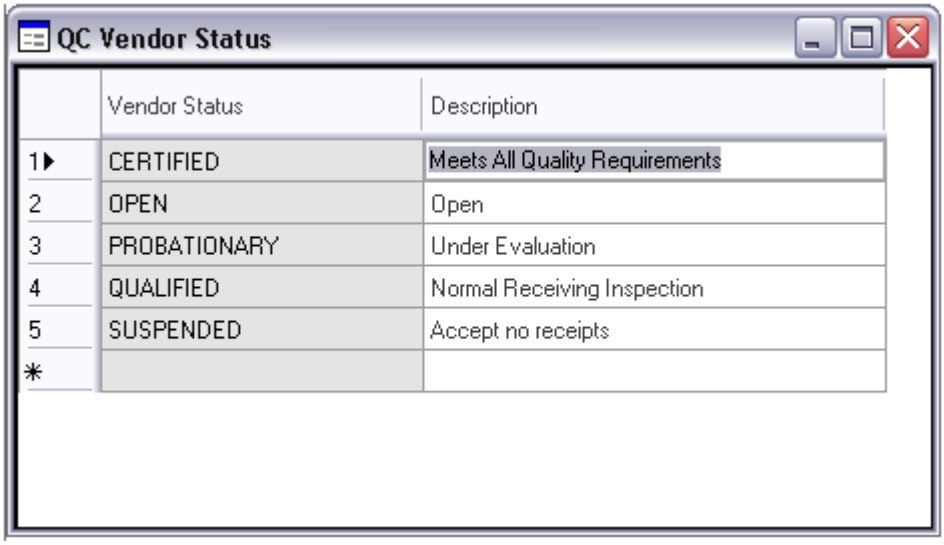
Field Descriptions:

- Points for On Time Delivery: Enter the highest number of points to be awarded a vendor based on delivery information.
- Days early (-)/Late (+): Enter the number of days early (enter as a negative: –10; -3; -1 above), on-time (0), late (enter as a positive: 1; 3; 7 above)
- Points Deducted: Enter the number of points to be deducted from the on-time delivery points if the associated number of days difference has occurred between the PO Line due date (or promise date depending on settings in QC Supplier Parameters) and actual delivery date (for example, if the delivery is 1 day late, 15 points will be deducted, so only 10 delivery points are awarded for that receipt)

Notes:

1) **The days early/late MUST be entered in order from maximum days early to on-time to max days late.**
2) **See Disposition Codes (page *78*) to set the Quality points for Vendor Performance.**

QC Vendor Status



QC Vendor Status

DESCRIPTION: Allows user to add, change and delete Vendor Status values. Used on the QC Vendors form.

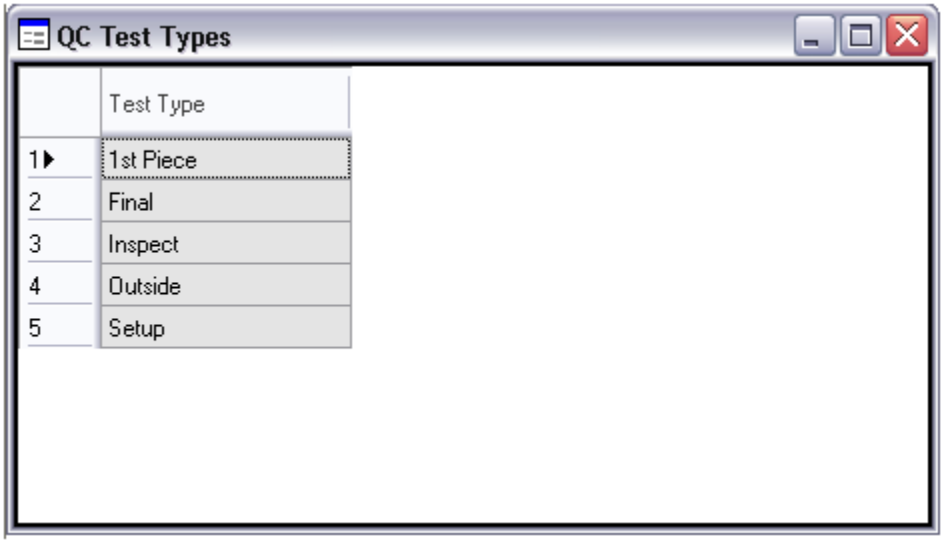
Field Descriptions:

- Vendor Status: User defined unique code
- Description: User defined

Notes:

1) **Any value with 'Suspend' in the Status can trigger a message to display when a Supplier Receiver is created for this vendor (see QC Supplier Parameters page *60*).**
2) **'Certified' Status does not affect any logic in QCS. Only Purchased items can be set up as 'CERTIFIED' (dock-to-stock).**

QC Test Types

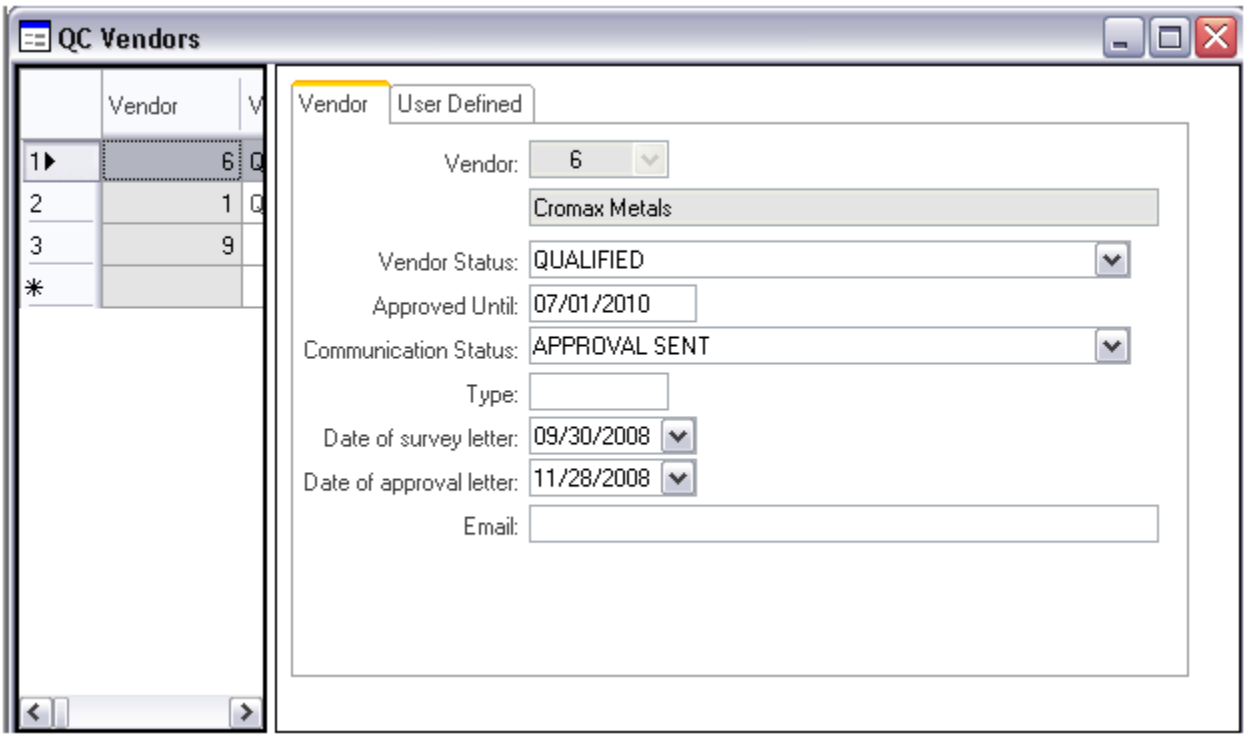


QC Test Types

DESCRIPTION: QC Test Types identify the type of tests as identified on the QC Item Master. This field is fixed and cannot be edited by the user. This information is for reference only and does not affect any QCS logic.

Field Description:

- Test Type: Values are listed



QC Vendors

DESCRIPTION: Allows user to add, change and delete QC information for SyteLine Vendors. Only vendors defined in QC Vendors are included in Vendor Performance reporting.

Field Descriptions:

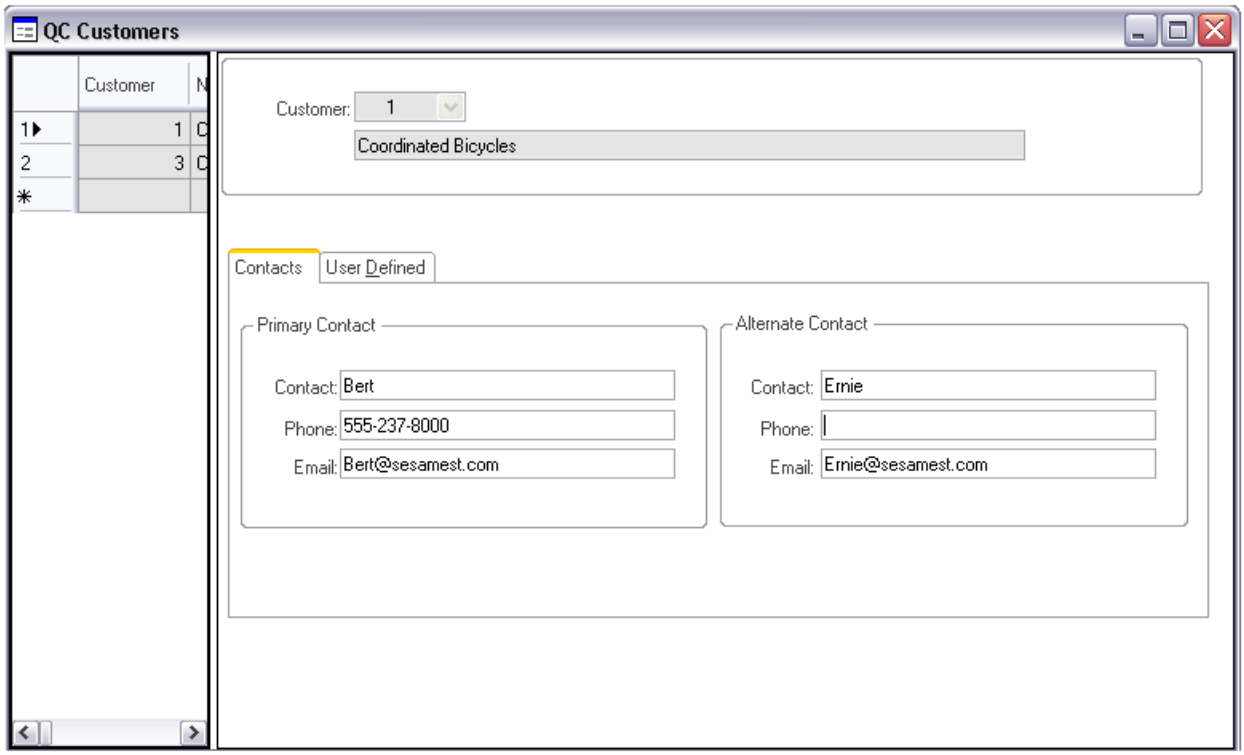
Vendor Tab:

- Vendor: Must be a valid SyteLine vendor
- Vendor Status: Validated against Vendor Status data
- Approved Until: User defined
- Communication Status: Select a valid code
- Type: User defined
- Date of survey letter: User selected date
- Date of approval letter: User selected date

User defined Tab:

- Access to the standard SyteLine 9.00 user defined fields

QC Customers



QC Customers

DESCRIPTION: Allows user to add, change and delete QC Information for SyteLine Customers.

Field Descriptions:

Header Tab:

- Customer: Valid SyteLine Customer
- Customer name – display only

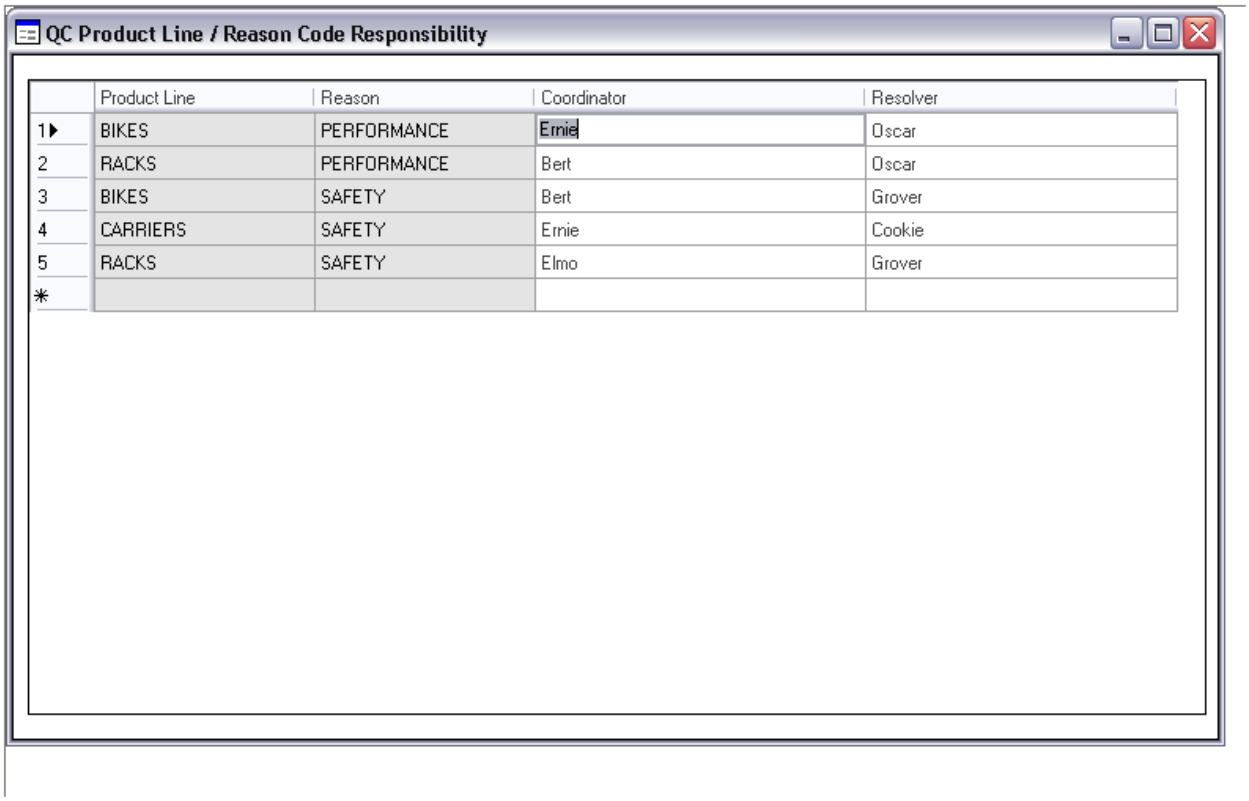
Contacts Tab:

- Primary and Alternate Contact/Contact
- Primary and Alternate Contact/Phone
- Primary and Alternate Contact/Email

User defined Tab:

- Access to the standard SyteLine 9.00 user defined fields

QC Product Line/Reason Code Responsibility

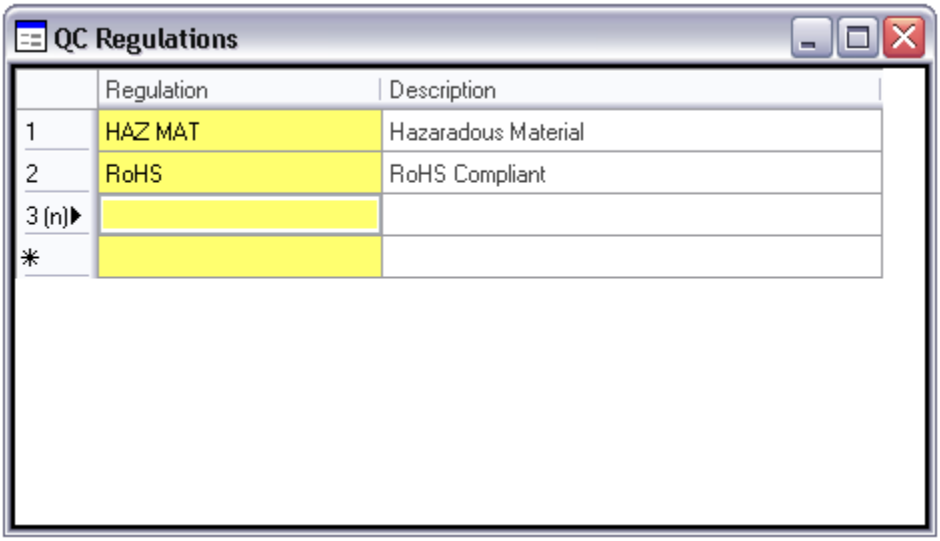


QC Product Line /Reason Code Responsibility

DESCRIPTION: The screen identifies coordinator and resolver for each combination of Product Line and CCR Reason code.

Field Descriptions:

- Product Line: Text entry, not validated against any SL Master file
- Reason: Text entry, not validated against any SL Master file
- Coordinator: Text entry, not validated against any SL Master file
- Resolver: Text entry, not validated against any SL Master file



QC Regulations

DESCRIPTION: Allows user to add, change or delete QC regulations that might impact the handling of an item.

- This table shows selections that can be made from the regulations field in the QC Items form.
- Regulations can be either internal or external to the company.
- Multiple regulations can be referenced in a single entry to this form.
- The use of this table and the corresponding field in QC Items is optional.

Example List #1:

CAUSE	DESCRIPTION
RoHS	Restriction of Hazardous Substances (EU)
RCRA	Resource Conservation and Recovery Act
HazMat	Hazardous Material
PPE	Personal Protective Equipment Required (internal)
RoHS & HazMat	Restriction of Haz. Sub. & Hazardous Mat

Field Descriptions:

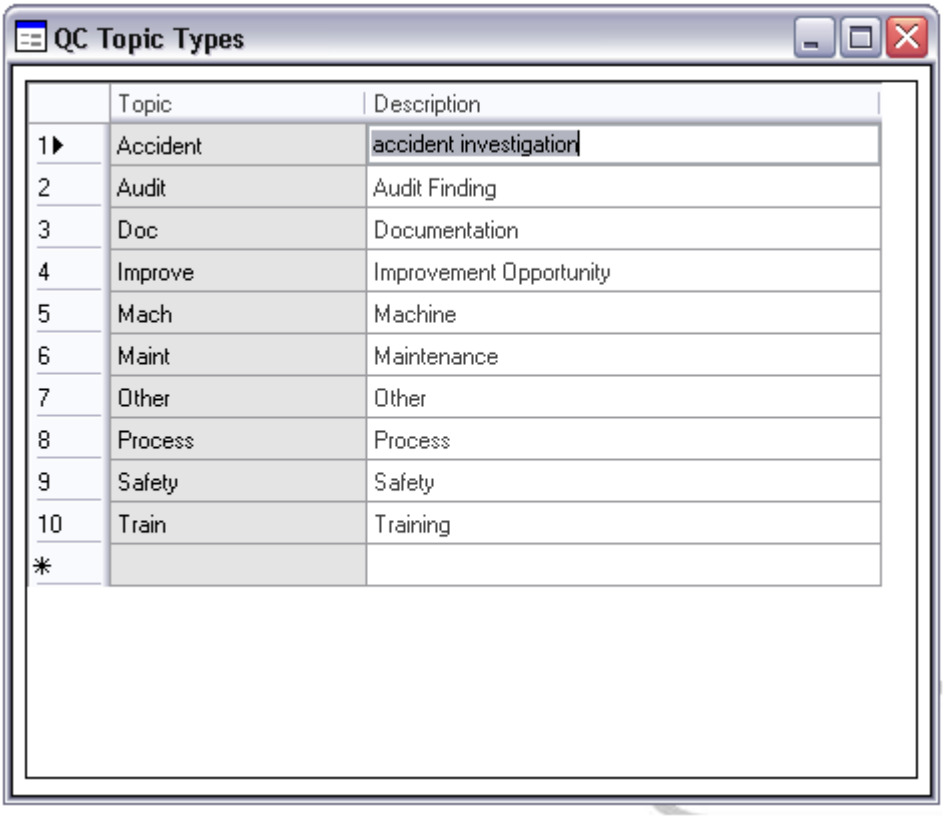
- Regulations: A brief designation for the specific regulation(s)
- Description: A description of the specific regulation(s)

QCS Enterprise Setup Overview

The following forms must be set up prior to utilizing the QC Enterprise module functionality:

Form Name	**Description and Example Entries**
QC Change Types	Change Types to be used in Change Management Requests. i.e.; Costing, Documentation, Material, Process, Tool/Machine
Employees	SyteLine Employee Maintenance. Users using the Non Material module must be given initials and an employee number.
QC Priorities	Priority levels for use in QC Topic and Change Receivers. i.e.; Low, Medium, High
QC Reason Codes	Reason Codes for the Non Material Module. Must be created with Ref Type N.
QC Non Material Status Listings	Status levels used with QC TRR and QC CMR records. i.e.; Closed, Under Review, Waiting for feedback
QC Topic Types	Topic description for QCS Topic receivers. i.e.; Accident, Audit, doc, Improve, Maint, Process, Safety
QC Sampling Criterias	Sets the number of most recent receivers that have been closed to determine the maximum quantity failed for the Loosed test criteria and the minimum quantity failed for the Tightened Test Criterias. Only required if Calculate AQL for Tests is checked in QC Enterprise Parameters
QC Test Plan Sampling Rates	Sets the test plan percentage based on the receiver lot size for loosened and tightened test criteria as set in the QC Sampling Criterias form Only required if Calculate AQL for Tests is checked in QC Enterprise Parameters

QC Topic Types



QC Topic Types

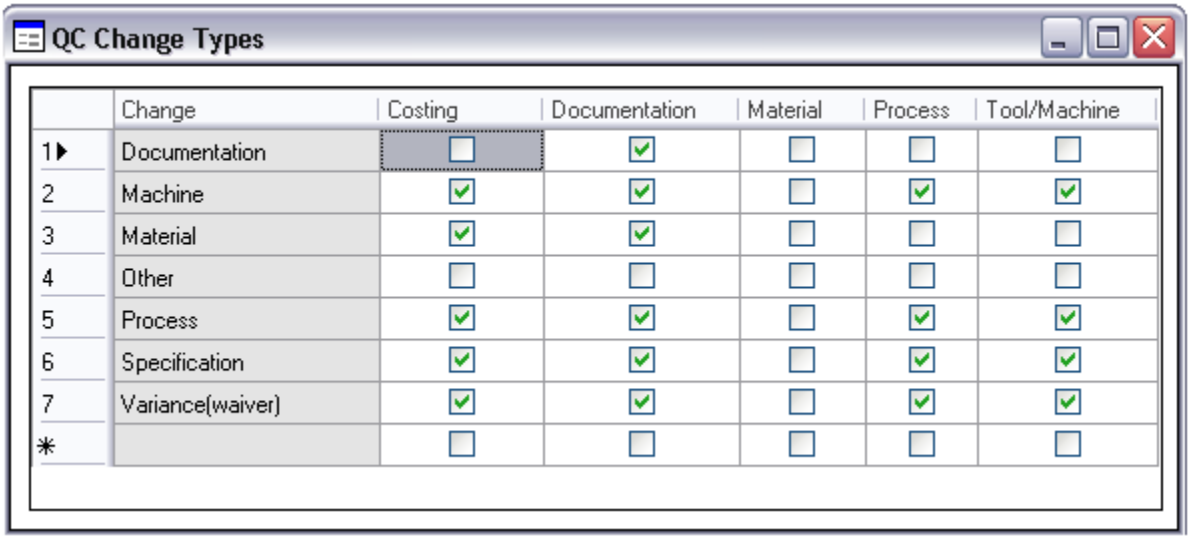
DESCRIPTION: This form contains QC Topic Types. Topic Types are assigned to QC Topic Receivers. An initial Topic Type is assigned during Topic Receiver creation, but addition ones can be assigned during QC Topic Management.

There are several predefined topic types, and the user can add additional types to this form.

Field Descriptions:
Header:

- Topic: A brief topic name
- Description: The description for the Topic

QC Change Types



	Change	Costing	Documentation	Material	Process	Tool/Machine
1	Documentation	☐	☑	☐	☐	☐
2	Machine	☑	☑	☐	☑	☑
3	Material	☑	☑	☐	☐	☐
4	Other	☐	☐	☐	☐	☐
5	Process	☑	☑	☐	☑	☑
6	Specification	☑	☑	☐	☑	☑
7	Variance(waiver)	☑	☑	☐	☑	☑
*		☐	☐	☐	☐	☐

QC Change Types

DESCRIPTION: This form details the specific components of a QC Change Type. A change may require the review of/by specific areas. These include the following:

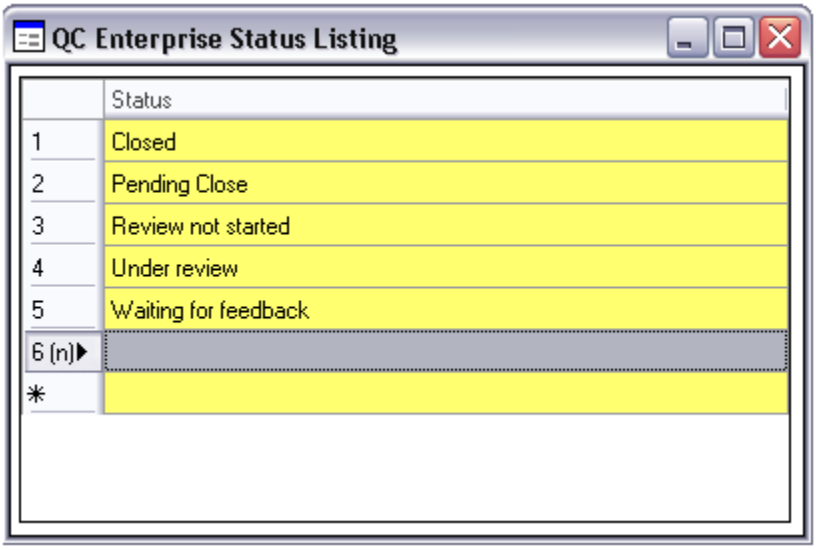
- Costing
- Documentation
- Material
- Process
- Tool/Machine

There are several predefined Change Types, but the user can add additional ones. The user can also delete predefined Change Types.

When a Change Type is entered/edited, the user can check the various functional areas that will be required to be reviewed for that Change Type. When a CMR is created with the specific Change Type the CMR cannot be closed until the individual functional area reviews have been closed.

Field Descriptions:
Header:

- Change (Required): Is the Name assigned to the change type
- Check Boxes for Functional Areas: when selected (checked) these areas become required review points for the specific Change Type. When not selected no review is required. Note that data for a functional area can be entered for areas that are not required.



QC Enterprise Status Listing

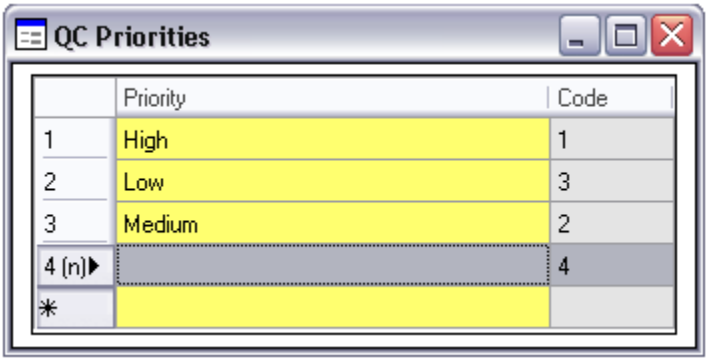
DESCRIPTION: This form contains QC Enterprise (Non Material) Status Listings. These listings are assigned on the QC Change Request Management and QC Topic Review Report. The listing gives a single field current status for the Topic or Change Request. The use of this field is optional.

There are several predefined status listings, but the user can add additional ones.
The user can also delete predefined Change Types.

Field Descriptions:

- Status: Status Description

QC Priorities



QC Priorities

DESCRIPTION: This form contains QC Priorities. Priorities are used on the QC Change and Topic Receivers. QC Change and Topic Receivers default to a priority of Low, but can be changed by the user. The user can also delete predefined Priorities.

There are three predefined Priorities (Low, Medium, and High), but the user can add additional ones.

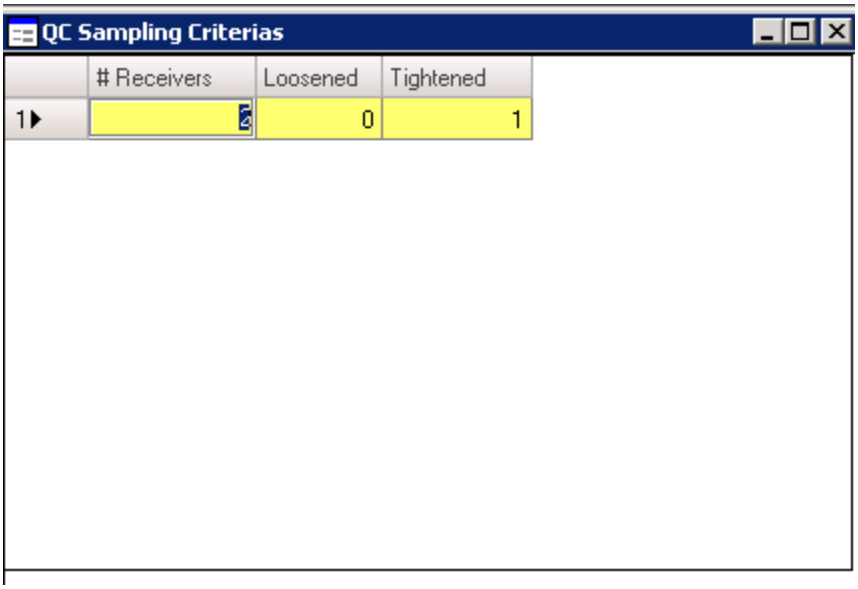
Field Descriptions:

- Priority: The name given to the Priority
- Code – A numeric priority identifier that is auto generated by the system;

NOTE:

When a user changes Priorities (either by adding new Priorities or by deleting) care must be taken so that the system generated code is in sequence with the desired hierarchy for the Priority names. (e.g. If a user wanted to add a Priority that was named "Medium Low" they would have to first delete the "Low" Priority then add "Medium Low," which the system would assign the next Code value of 4 and then add "Low" which would have an assigned Priority of 5. This would keep the assigned code and name descriptions in sequence.

QC Sampling Criterias



QC Sampling Criterias

DESCRIPTION: This form sets the number of Completed receivers for the system to look and then determine the quantity of the item that was rejected to determine which of the available sampling plans should be used. This form is only active if the Calculate AQL for Tests is checked in the QC Enterprise Parameters form.

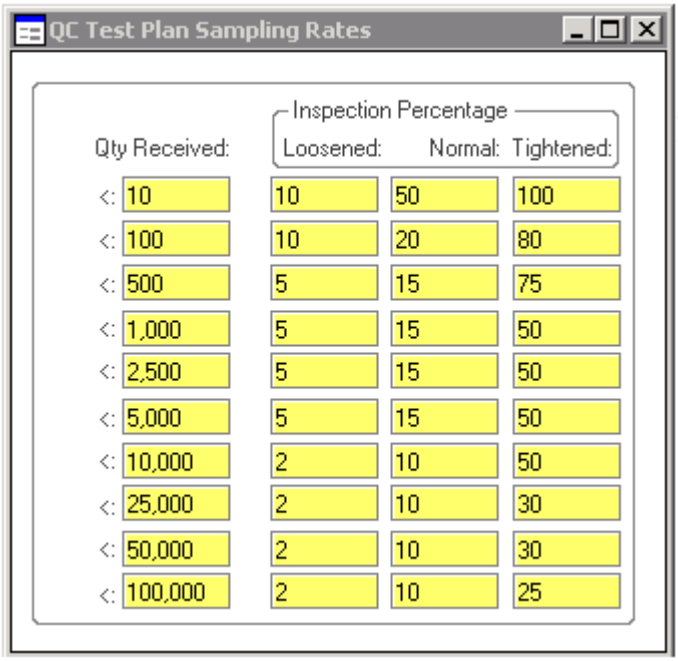
There are three possible sampling plans: Loosened, Normal and Tightened.

Field Descriptions:

- # Receivers: This is the number of closed receivers that the system will use to calculate the quantity of rejected items. The System looks at only closed receivers and looks in the order of most recently created to oldest receiver.
- Loosened: This is the maximum quantity of the item that can be rejected for the system to use the Loosened sampling plan from the QC Test Plan Sampling Rates Form.
- Tightened: This is the minimum quantity of the item that is rejected before the system uses the Tightened sampling plan from the QC Test Plan Sampling Rated Form.

NOTE: Should the number of rejects be more than the Loosened Quantity but less than the Tightened Quantity then the Normal sampling plan from the QC test Plan Sampling Rates Form is used.

QC Test Plan Sampling Rates



QC Test Plan Sampling Rates

DESCRIPTION: This form contains the progression for the percentage of a lot size that will be used on a test creation plan based on the test criteria as determined from the information on the QC Sampling Criterias Form.

There are three predefined Sampling Plans (Loosened, Normal, and Tightened), these can be used in addition to the Certified Inspection Frequency on the QC Items form for Supplier Items to give a total of 4 possible test rates.

Field Descriptions:

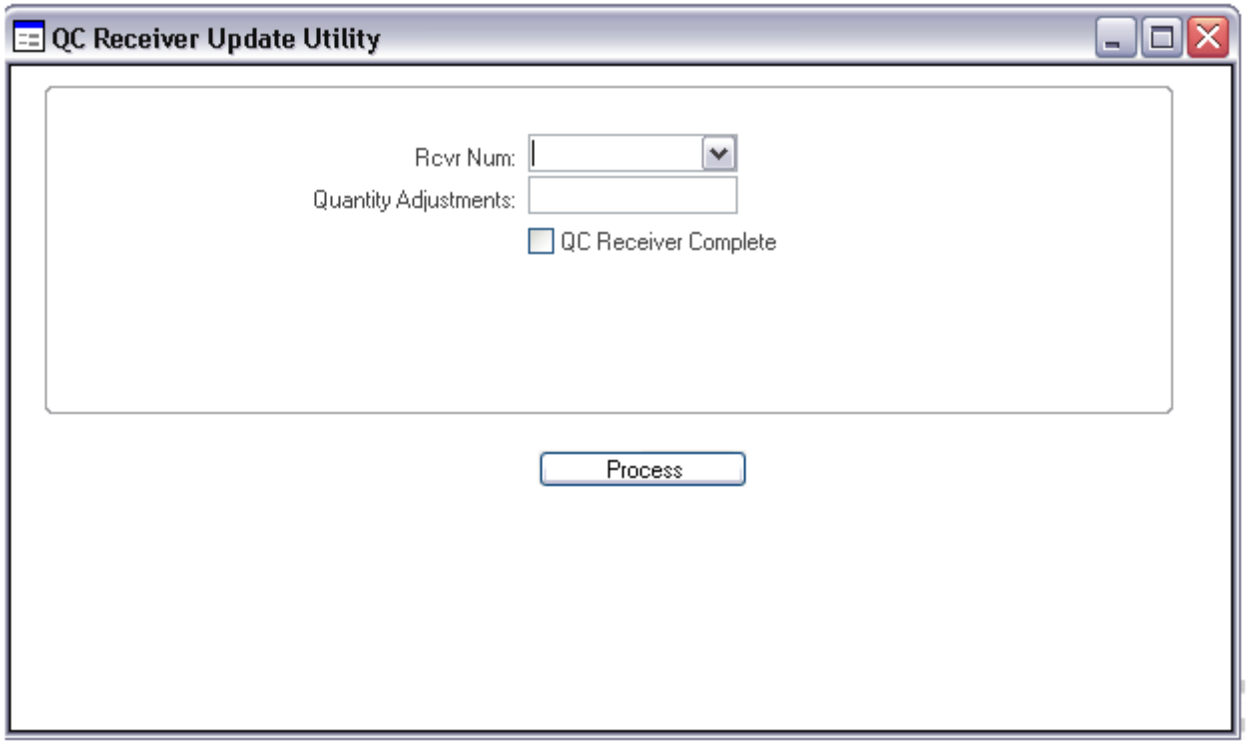
- Qty Received: This must be entered in ascending order and is the less than number for a lot to use the associated inspection percentages.
    - Example: If the first 2 rows are 10 and 100 then if less than 10 are received the percentage will be from the first row (<10). If the lot size is between 10 and 99 then the percentage will be from the second (<100) row.
- Loosened – This is the percentage of the lot size that will be used to calculate the sample size for test plan if the loosed criteria are met from the QC Sampling Criterias Form.
- Normal – This is the percentage of the lot size that will be used to calculate the sample size for test plan; if the criteria from the QC Sampling Criterias Form is between the Loosened and Tightened settings.

Tightened – this is the percentage of the lot size that will be used to calculate the sample size for test plan if the tightened criteria are met from the QC Sampling Criterias Form.

QCS Utilities

The Utilities on the following pages can be used across modules.

QC Receiver Update Utility



QC Receiver Update Utility

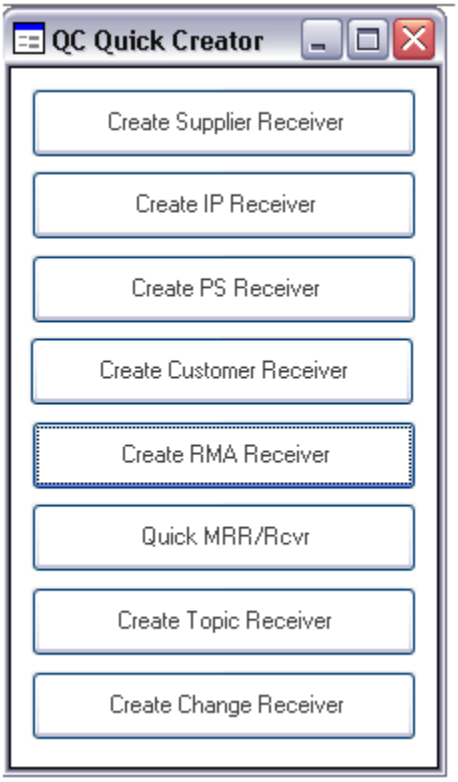
DESCRIPTION: The screen allows users to make quantity adjustments, or mark as complete, an existing receiver (within the limits of what has already been dispositioned). For example, this can be used where a Purchase Order Receipt creates a receiver, but then a subset of the receipt is 'unreceived'. This utility can be used to adjust the quantity on the receiver.

Field Descriptions:

- Rcvr Num: Enter an existing receiver number
- Quantity Adjustments: Enter the ADJUSTING AMOUNT (positive or negative) to be applied to the Quantity Received for the receiver. (e.g. 10 (to add a qty of 10), or –3 (to subtract a qty of 3))
- QC Receiver Complete: The selected receiver's complete flag will be set or unset based on if this box is checked or unchecked.

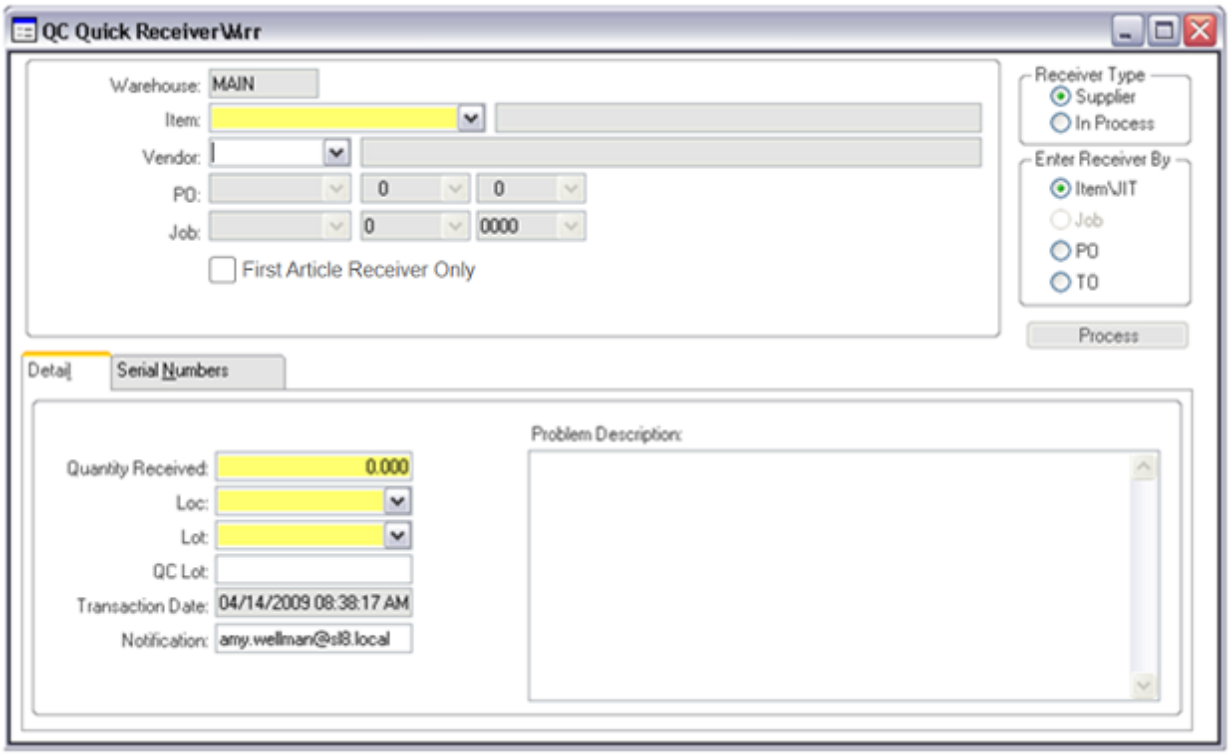
- Process Button: Updates to the receiver will be made.

QC Quick Creator



QC Quick Creator

DESCRIPTION: This form is used to provide an easy method to open the various create documents (receivers, MRRs, Topics and Changes).



QC Quick Receiver/MRR

DESCRIPTION: This form is used to provide an easy method to create receivers, MRRs and QCS Items. This can also be used to allow access to create receivers to a different security group of users.

Field Descriptions:

Header

- Receiver Type: Supplier/In Process. Only Supplier or In-Process receivers/MRRs can be created from this Utility. Select the proper radio-button.
- Enter Receiver By:
  - Item/JIT: If Receiver Type /Supplier is selected, indicates that you wish to create the receiver by Item with no PO reference.
  - Job: If Receiver Type/In Process is selected, indicates that you wish to create the receiver from a Job.
  - PO: If Receiver Type/Supplier is selected, indicates that you wish to create the receiver from a PO.

- TO: If Receiver Type/Supplier is selected, indicates if you wish to create the receiver without a PO reference.

- Whse: Currently selected SyteLine Warehouse

- Item: (Available only if Receiver Type: Supplier and Enter Receiver by: Item or Receiver Type: In Process and Enter Receiver By: Item/JIT). Enter the item for the receiver/MRR. Must be a valid SyteLine item. If the system is set up to allow a user to create QCS Items on the fly (for this receiver type), if this is not a QCS Item for this type, the user will be prompted if they wish to create it. If system is set to NOT allow user to create QCS Items, this must be a valid QCS Item for this type. The Item description will display.

- Vendor: (Available only if Receiver Type: Supplier and Enter Receiver by: Item). Optionally enter a vendor related to this Item for the receiver. If entered, must be a valid SyteLine Vendor. Vendor Name will display.

- PO: (Available only if Receiver Type: Supplier and Enter Receiver by: PO or TO). Enter a valid SyteLine Po/Line/Release. If not allowed to auto-create QCS Items for Supplier, PO Line's Item must already exist as a Supplier QCS Item.

- Job: (Available only if Receiver Type: In Process). Enter a Valid Job/Suffix/Operation. If not allowed to auto-create QCS Items for In Process, Job's Item/Operation must already exist as an In Process QCS Item.

- <Process> Button: Once all data has been entered, press this button to create the item (if required), receiver and MRR (if required). Paperwork and QCS Information forms will be provided based on parameter settings.

Detail

- Quantity Received: Quantity to place on the receiver (and optionally, be moved to the MRR, based on parameters)

- Loc: (Available only if Receiver Type: Supplier). Where the item is located in stock

- Lot: (Available only if Receiver Type: Supplier). If applicable, Lot number of this item for this receiver

- QC Lot: User defined

- Transaction Date: <System Default>

- Notification: If using the e-mail notification, and creating an MRR, this will default to the MRR notification address(es) from the parameter file. This can be overridden by the user.

- Problem Description: If creating an MRR, detailed problem description for that table/reference

QCS Supplier Section

QCS Supplier Overview

The Quality Control Solution (QCS) Supplier module allows SyteLine users to track Quality information on purchased/incoming material. QCS Supplier provides the tools to track and report on: Cost of Quality, Vendor Performance, Material Review Reports (MRRs), and Corrective Action Reports (CARs). QCS allows users to comply with sections of the ISO 9001 Quality Systems Model.

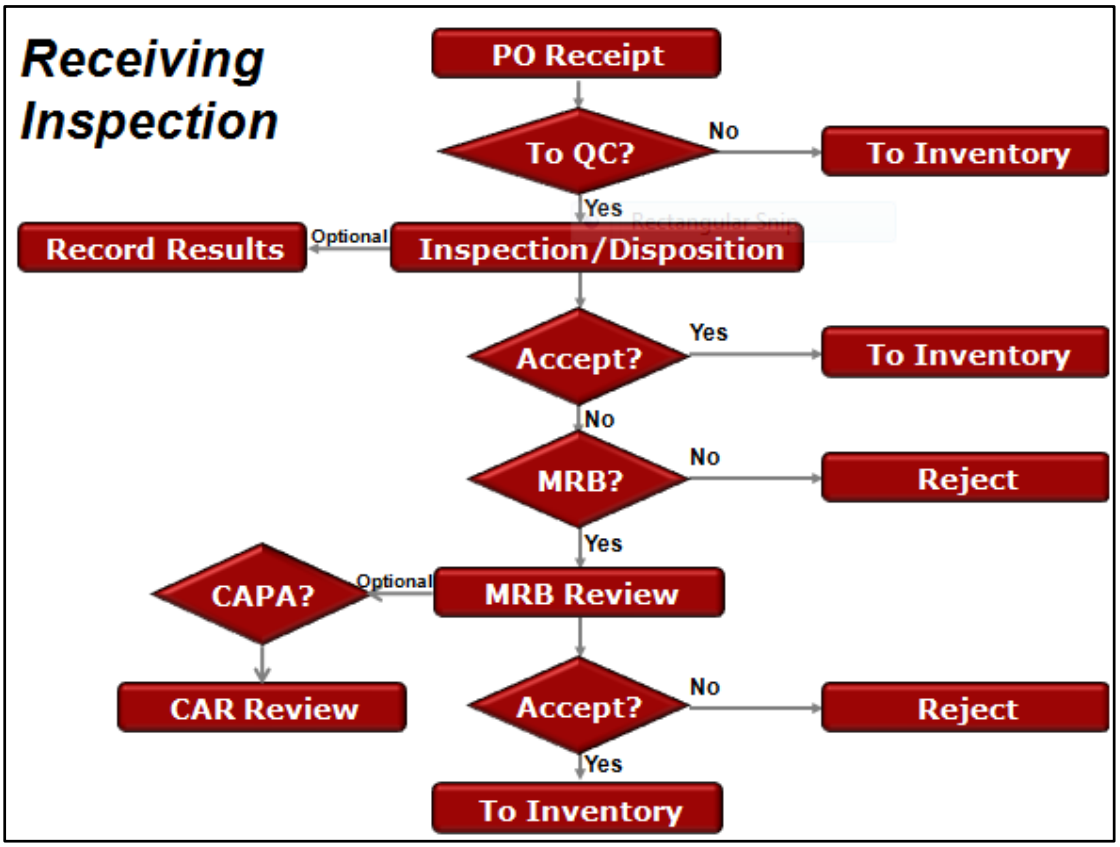
All QCS access is via Infor SyteLine 9.00 for QCS 9.00. Standard forms, navigation, functionality and terminology from SyteLine are used.

The QCS Setup Section of this manual (page *10*) should be reviewed prior to learning the details for setting up and using the QCS Supplier module. This section of the manual introduces you to how the QCS Supplier module works to assist you in tracking Quality information about your purchased parts.

There are two general methods of getting received parts into QCS (these are reviewed in the next few pages). The transaction that will track this occurrence is called a receiver. A receiver has a unique number identifier. All activity against that receipt will be tracked by the receiver number. A receiver is an order to the Quality Department to inspect/disposition material or to address a specific quality topic.

Once a receiver is created, QCS processing is the same (regardless of how it was created). You may wish to use a mix of methods based on different situations that occur at your company.

Following is an overview of the Purchase Order Receiving method of creating and tracking Quality information on Supplier items using the QCS Supplier module:

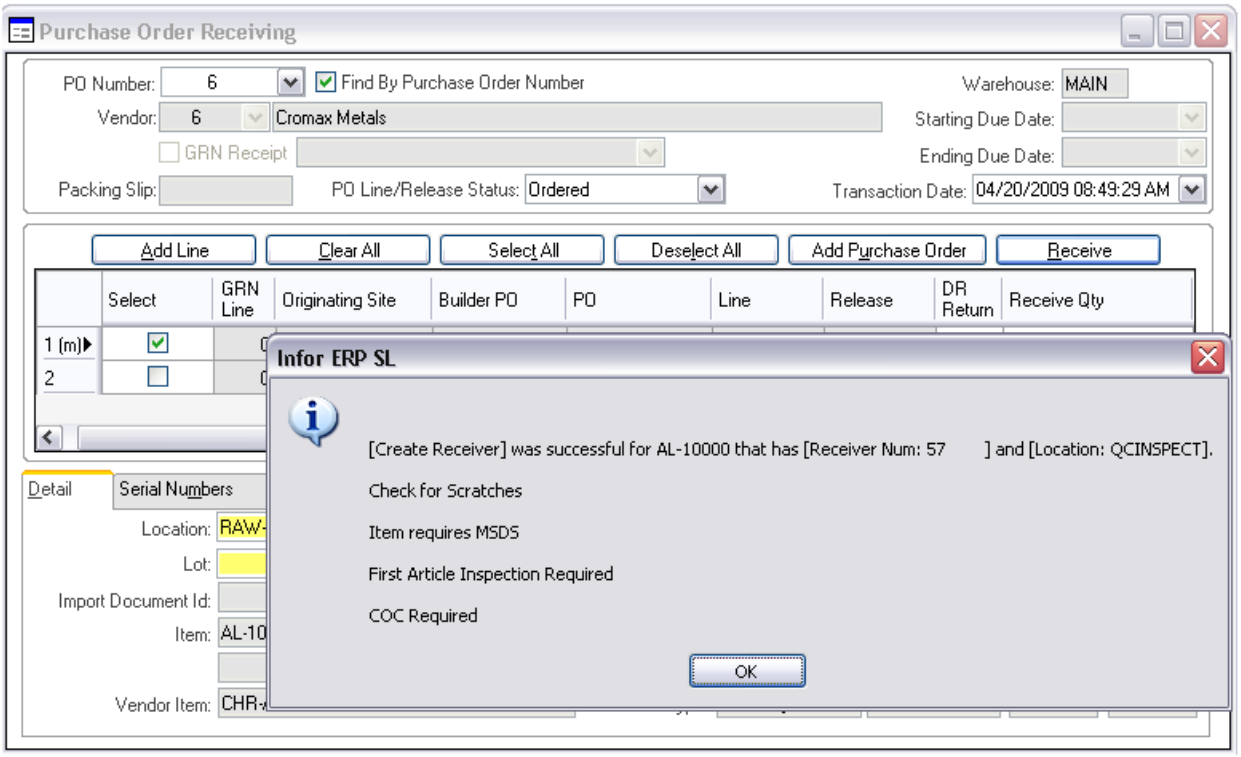


Create a Supplier Receiver – Purchase Order Receiving

- **Set up QCS Supplier parameters to automatically create receivers when items are received (please see the QCS Setup Section of this manual)**
- **Perform Purchase Order Receiving**
    - **move material into inventory (option: move to a special QCS location)**
    - **create a receiver to track items through QCS**

Using this method, a receiver is created during the standard SyteLine Purchase Order Receiving process. QCS uses settings in the Supplier parameter form, and coding set up for the QCS item to determine if this receipt requires QCS processing at this time. If so, the receiver is created for you, referencing the PO information (vendor, PO, line, release –if used, receipt date, quantity received).

Another option available, based on the parameters, is to set up a special QCS location for received items that are going through QCS. If this is chosen, the receipt location will be changed to the QCS location for the SyteLine Purchase Order Receipt.



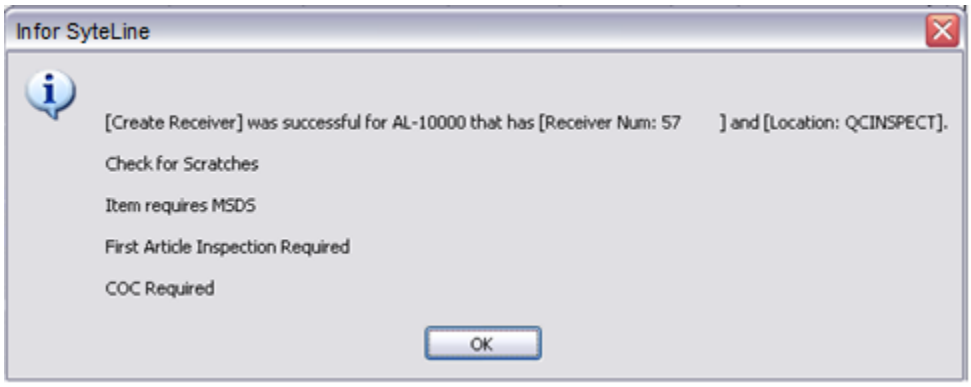
Process Steps:

- Material is delivered to your company
- SyteLine user receives the items into inventory using the standard Purchase Order Receiving form
- If your QC Supplier Parameter (Auto Create Supplier Receivers) is set to auto-create receivers, and this item needs to go through your Quality department for this receipt, the following will occur:
    - If there is a QC Location set up, the system changes the receiving location to the QC location (QC Supplier Parameters: QC Location)
    - If this Item (or Item/Vendor combination) is set up for QCS processing – and this receipt must go through Quality based on receipt history and the QC Items Inspection Frequency, a QCS receiver is created for this PO/Line/Release/Quantity Received (Inspection Frequency and QC Item sections in the QCS Supplier Manual)
    - You will receive a notification that a receiver was created for each line received requiring QC, the associated receiver number assigned, its item, and the items location.

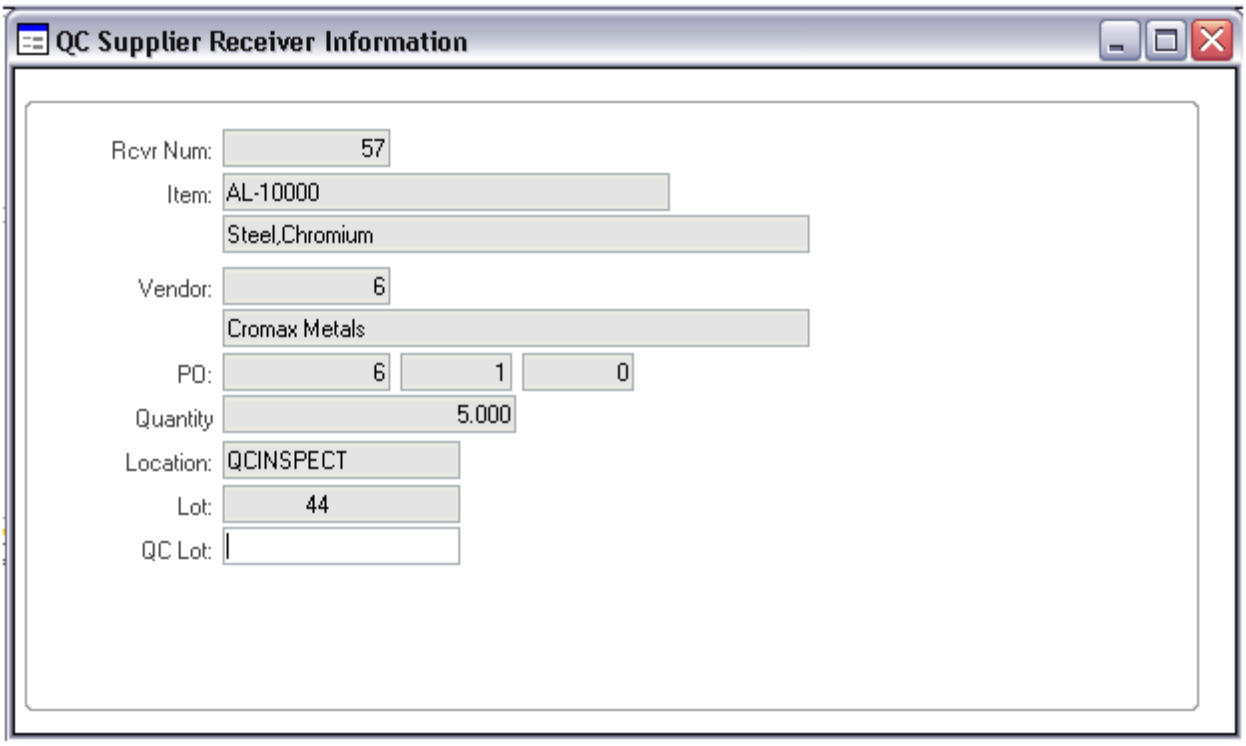
- Based on QC Supplier Parameter, and QC Item settings, additional information will be displayed with the above notification (QC Supplier Parameters: Display QC Vendor Alerts in SyteLine, Display Supplier Item Alerts in SyteLine, QC Item: Alert, C of C Required, First Article, MSDS Required, Regulation)
- Based on QC Supplier Parameters, if you have chosen to print tags, a receipt tag will print for each receiver created (Default For QC Supplier Inspection Tags).
- Based on QC Supplier Parameters, if you have chosen to see the QC Information Form – a form will pop up for each receiver created. From here you can update the QC Lot and/or add notes to this receiver (Display QC Window when creating Receiver).

- Unless the receiver is automatically marked as 'Accepted', the QCS user will now need to report on this receiver using the QC Supplier Inspect/Disposition form. If this receiver is Auto-Accepted (this is used when all receipts are tracked for Vendor Performance Reporting purposes, but not every receipt requires physical testing), it will also be marked with its complete quantity Accepted (using the Reason and Disposition codes set in the QC Supplier Parameters). The user can also decide if tags for these receivers will be marked as 'Received' or 'Accepted'.

Below is a sample of the message box that displays when a receiver is created. Note that for this example, the line 'Check for Scratches' is the value of the 'Alert' field for this QCS Item. (please see QC Item in the QCS Setup Manual)

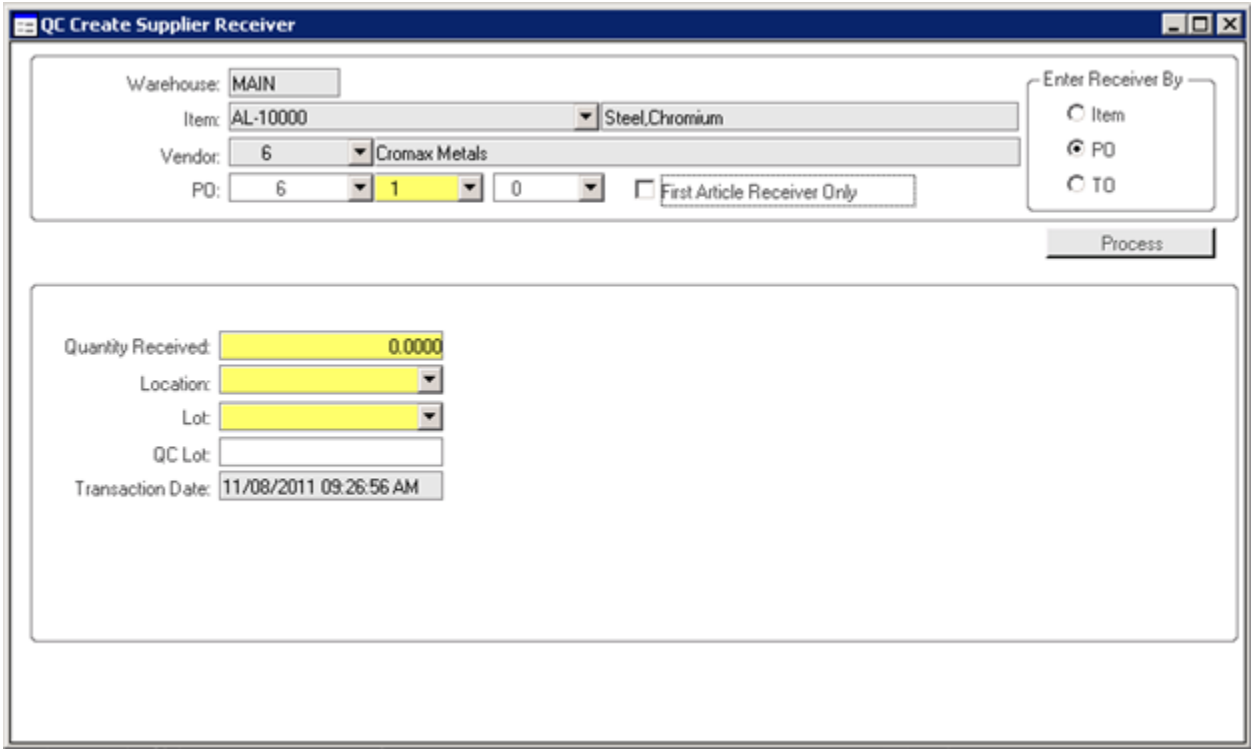


Below is a sample of the QC Supplier Receiver Information form that displays (based on QC Supplier Parameters settings)



As noted previously, only two areas can be altered with this form, a QC Lot can be set or updated, and notes can be added to the receiver using the 'Notes' icon in the toolbar.

- **This method can be used in place of the 'Purchase Order Receiving' method, or as an option for moving parts into QCS outside of the Purchasing process flow.**
- **Receiver can be created with:**
  - **A Purchase Order/Line/Release**
  - **An Item and Vendor reference (vendor reference is optional)**
  - **An Item reference only**
  - **Note that no inventory transaction occurs when the receiver is created.**



QC Create Supplier Receiver

DESCRIPTION: Allows user to manually create a Supplier receiver for QC. If First Article receiver Only is checked, then a receiver for First Article testing will be created. (See the following section)

Process Steps:

- Material is delivered to your company, or problem material is identified onsite
- Use QC Create Supplier Receiver (see page *122*). When processed, the following will occur:
    - You will receive a notification that the receiver was created (and its number).
    - Based on QC Supplier Parameter, and QC Item settings, additional information will be displayed with the above.
    - Based on QC Supplier Parameters, if you have chosen to print tags, a receipt tag will print for the receiver created (Default For QC Supplier Inspection Tags).
    - Based on QC Supplier Parameters, if you have chosen to see the QC Information Form – a form will pop up for the receiver created. From here you can update the QC Lot and/or add notes to this receiver. (Display QC Window when creating Receiver)

NOTE:

- **If desired, a Quantity Move transaction must be manually completed to move the material from its current location to the QCINSPECT Location. If no Quantity Move Transaction is made then the material will stay in its current location in the system.**
- **If a Vendor is not selected, then the final disposition of the material will not impact the vendor rating and a VRMA will not be created when rejecting on an MRR.**
- **If you wish to have all QC material in QC tracked through SyteLine locations set up for QC, the material must be moved into the QC location prior to manually creating the receiver.**
- **Any alerts and messages set up for this QC Item will be displayed, along with the number of the receiver just created.**
- **If the QC Supplier Parameters are set up to 'Display the QC Window', a second window will be displayed after the receiver is created, allowing the user to add/change the QC Lot and add notes to the receiver.**
- **Only receivers with a vendor will be tracked for the Vendor Performance Report.**
- **If the QC Supplier Parameters are set up to 'Default for QC Supplier Tags', a 'RECEIVED' tag will be generated.**

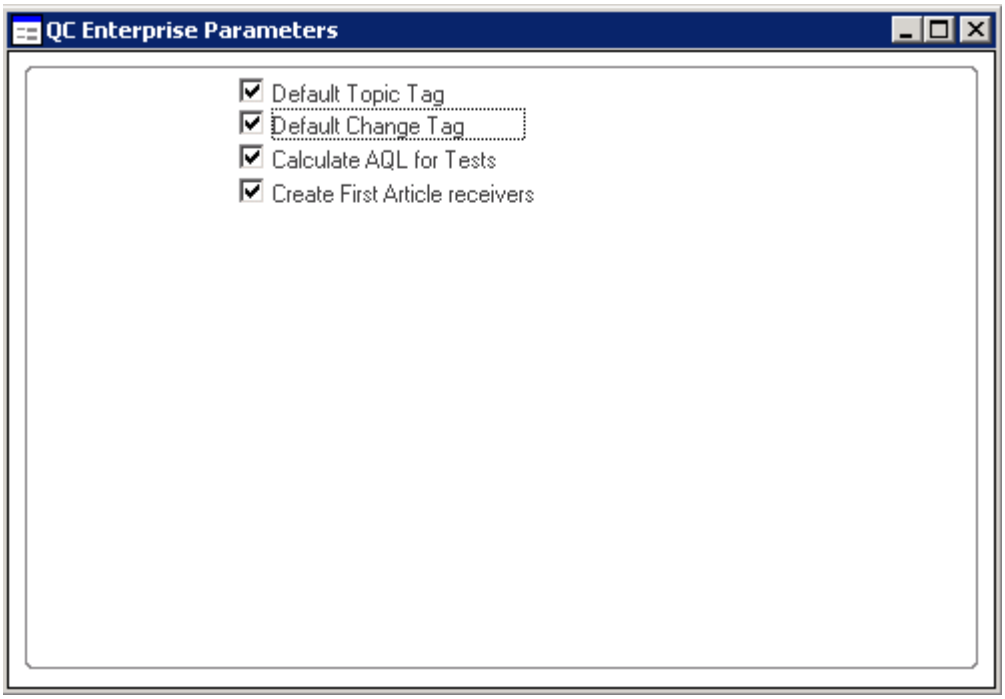
Create a Supplier Receiver – Purchase Order Receiving With First Article Inspection

- **This is the same as Create a Supplier Receiver except that it adds an additional receiver for the First Article Inspection.**

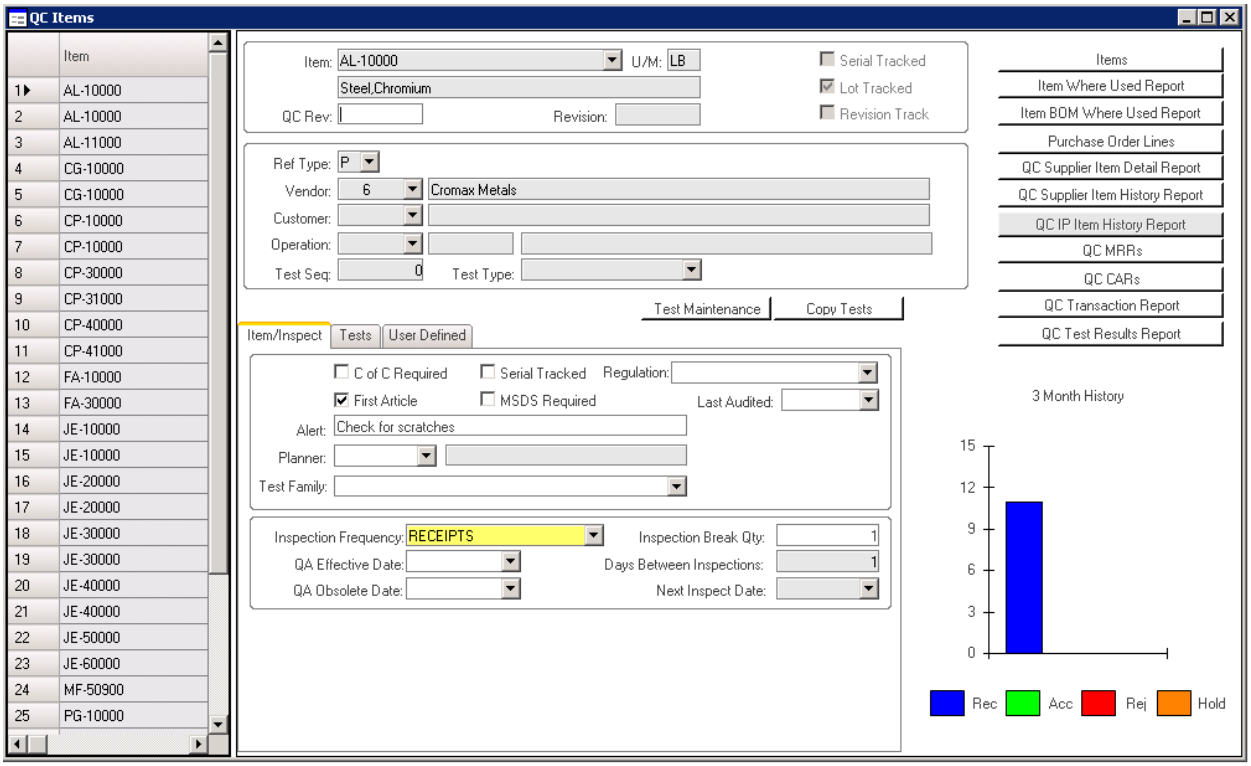
Using this method, a second receiver is created during the standard SyteLine Purchase Order Receiving process. The standard receiver is created as already outlined. The second receiver does not have any disposition associated with it and is only used for recording First Article Inspection data.

The following must be completed in order for a First Article Receiver to be created:

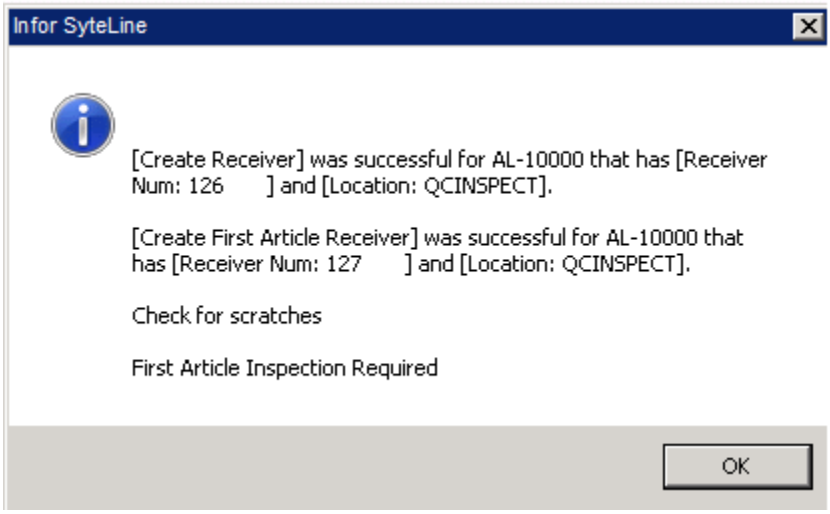
1. QCS Enterprise module must be installed and licensed in addition to the QCS Supplier Module
2. The Create First Article receivers option on the QC Enterprise Parameters for must be checked



3. For the specific QC Item – vendor Combination (or QC Item with blank vendor if applicable) the First Article box must be checked on the C Items form in the Item/Inspection tab



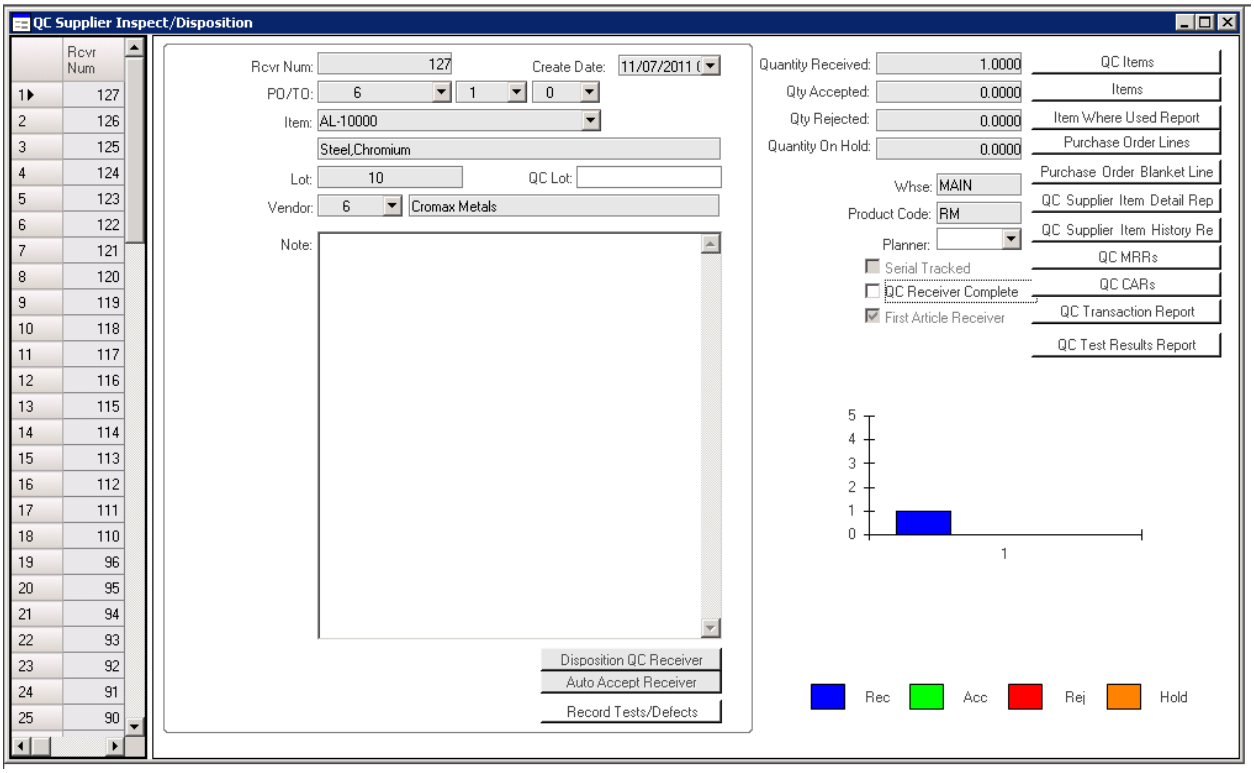
NOTE: If only the First Article on the QC Item is checked and not the parameter than an alert will pop up but no first article receiver will be created.



Process Steps:

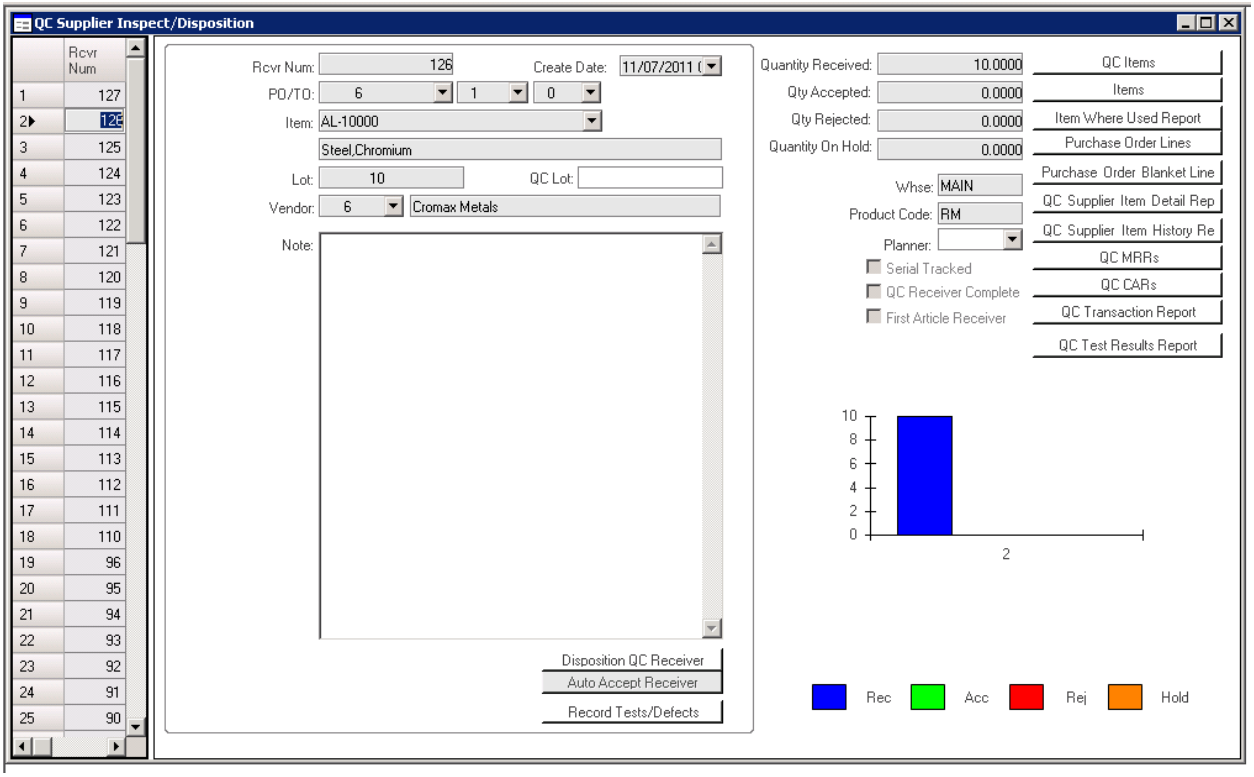
- The process steps are the same as receiving an Item without the First Aricle activated except that there are now 2 receivers. One for First Article only and the second a standard receiver.

Here is an example of a Supplier Receiver for a first article:



This looks exactly the same except that the Disposition QC receiver button is not active.

Here is a screen shot of the standard receiver:



You will note:

- The First Article Receiver is for a quantity of one
- The Standard Receiver is for the receipt quantity (in this case 10)
- The First Article Receiver only allows for the Recording of Defects. You cannot disposition this receiver.

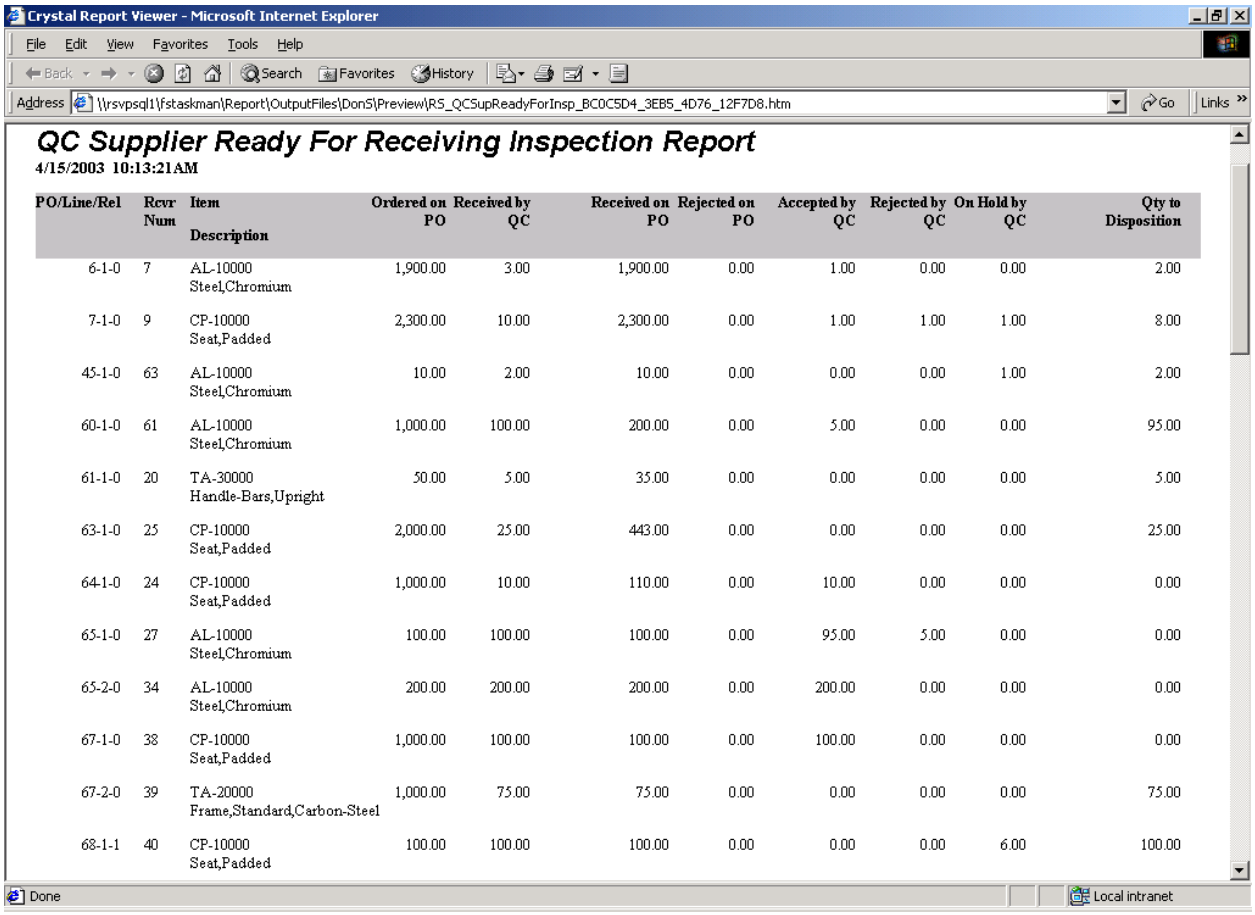
If you require a second first article receiver (you can create as many as you want) then you would use the Create Supplier Receiver Manual by selecting the PO Enter Receiver By option and then entering the PO and line and making sure that they First Article receiver only is checked.

Identifying Receipts Waiting for Disposition

There are several methods you can use to check on the work waiting in the QCS queue. Any one or a combination of these methods can help you schedule activity in the Quality Assurance area.

- **Preview/Print the QC Supplier Ready for Receiving Inspection Report**
- **Access the QC Supplier Inspect/Disposition form**
- **Access the QC Supplier Inspect/Disposition Query form**

QC Supplier Ready for Receiving Inspection Report

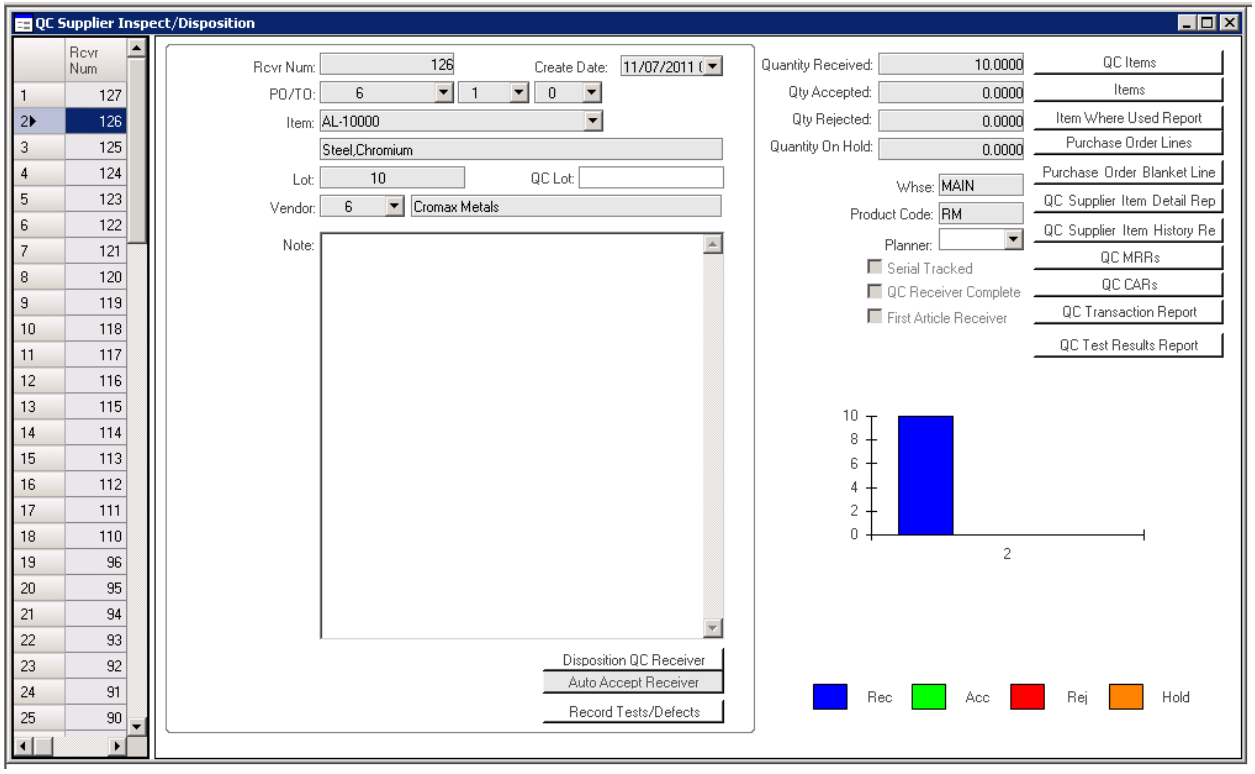


PO/Line/Rel	Rcvr Num	Item Description	Ordered on PO	Received by QC	Received on PO	Rejected on PO	Accepted by QC	Rejected by QC	On Hold by QC	Qty to Disposition
6-1-0	7	AL-10000 Steel,Chromium	1,900.00	3.00	1,900.00	0.00	1.00	0.00	0.00	2.00
7-1-0	9	CP-10000 Seat,Padded	2,300.00	10.00	2,300.00	0.00	1.00	1.00	1.00	8.00
45-1-0	63	AL-10000 Steel,Chromium	10.00	2.00	10.00	0.00	0.00	0.00	1.00	2.00
60-1-0	61	AL-10000 Steel,Chromium	1,000.00	100.00	200.00	0.00	5.00	0.00	0.00	95.00
61-1-0	20	TA-30000 Handle-Bars,Upright	50.00	5.00	35.00	0.00	0.00	0.00	0.00	5.00
63-1-0	25	CP-10000 Seat,Padded	2,000.00	25.00	443.00	0.00	0.00	0.00	0.00	25.00
64-1-0	24	CP-10000 Seat,Padded	1,000.00	10.00	110.00	0.00	10.00	0.00	0.00	0.00
65-1-0	27	AL-10000 Steel,Chromium	100.00	100.00	100.00	0.00	95.00	5.00	0.00	0.00
65-2-0	34	AL-10000 Steel,Chromium	200.00	200.00	200.00	0.00	200.00	0.00	0.00	0.00
67-1-0	38	CP-10000 Seat,Padded	1,000.00	100.00	100.00	0.00	100.00	0.00	0.00	0.00
67-2-0	39	TA-20000 Frame,Standard,Carbon-Steel	1,000.00	75.00	75.00	0.00	0.00	0.00	0.00	75.00
68-1-1	40	CP-10000 Seat,Padded	100.00	100.00	100.00	0.00	0.00	0.00	6.00	100.00

QC Supplier Ready for Receiving Inspection Report

DESCRIPTION: This report provides a listing of the material that is currently awaiting disposition by the Quality Department; i.e. this is a listing of material received into QCS that has not yet been marked as complete.

Inspect/Disposition Lookup

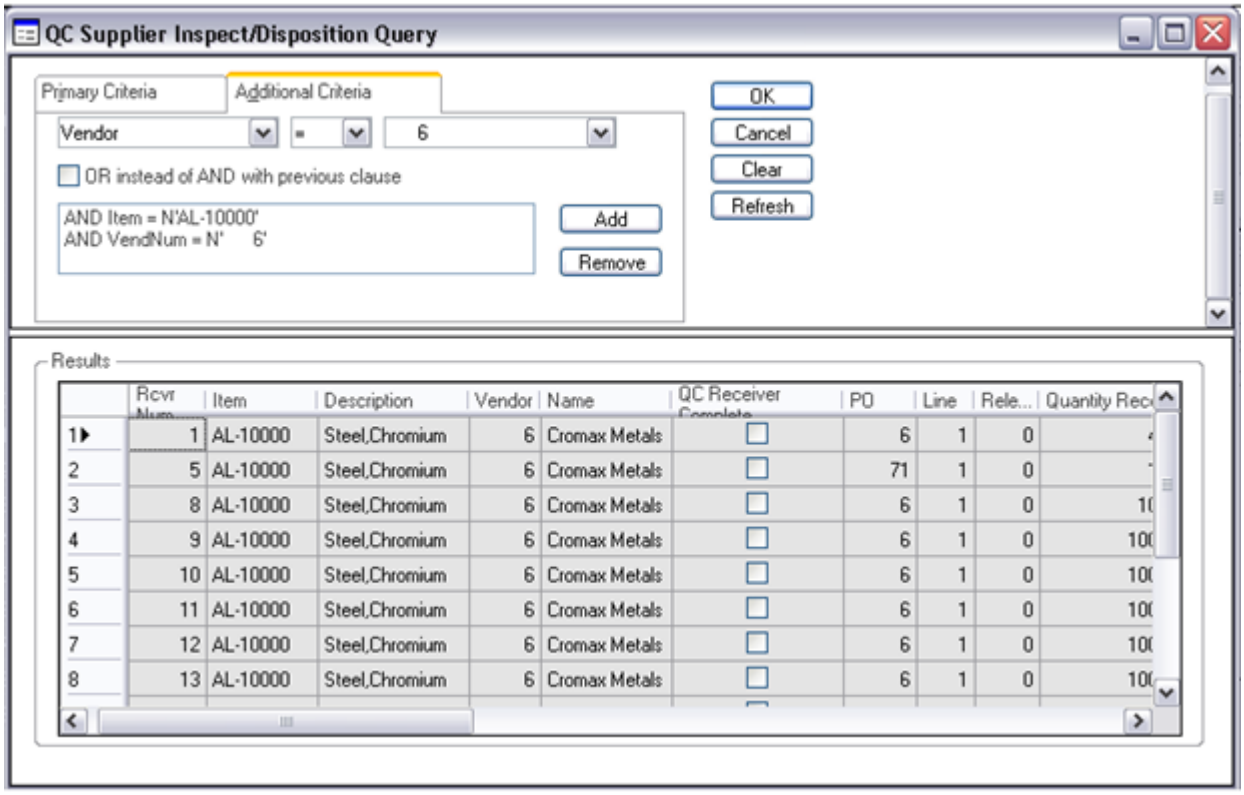


QC Supplier Inspect/Disposition

DESCRIPTION: This form is used to select a receiver to disposition and/or to record test results against that receiver.

- As with any SyteLine form, the number of receivers that show is based on your 'maximum retrieval' setting.
- By default, the receivers will display in reverse chronological order by receiver number
- By default, all receivers will be displayed
- The form will open in 'Filter' mode – you may fine-tune your query by any of the available fields to get a specific picture of the work in (or already completed from) the Quality department.

Inspect/Disposition Query Lookup

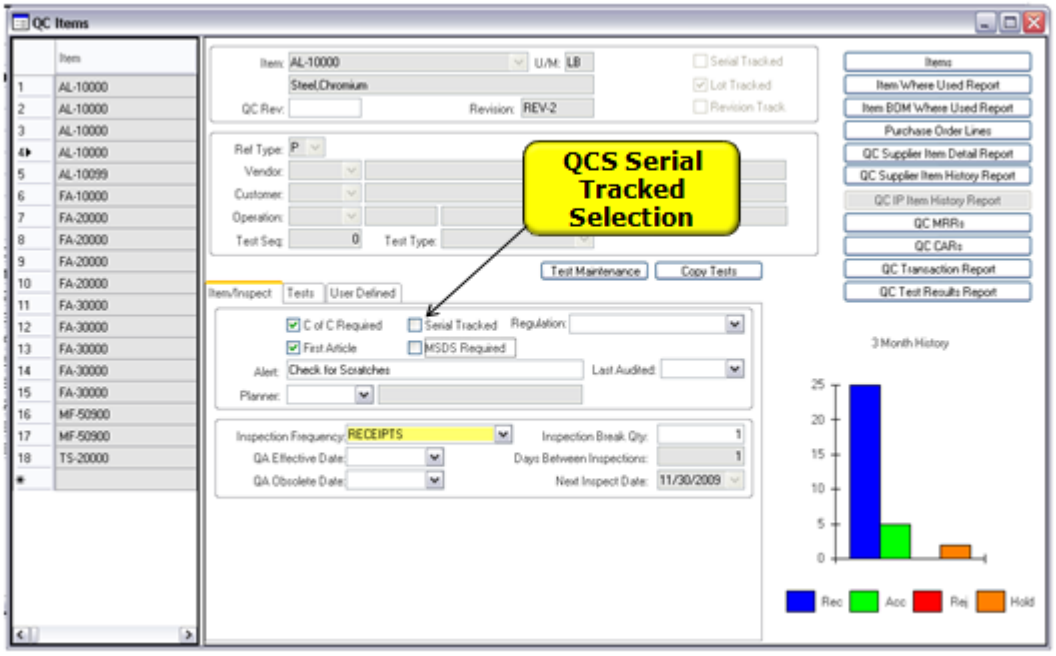


QC Supplier Inspect/Disposition Query

DESCRIPTION: This form allows the user to define a query for QCS Supplier Receivers. When configured as shown, the query displays all open Supplier Receivers. Use standard SyteLine query functionality to fine-tune your query.

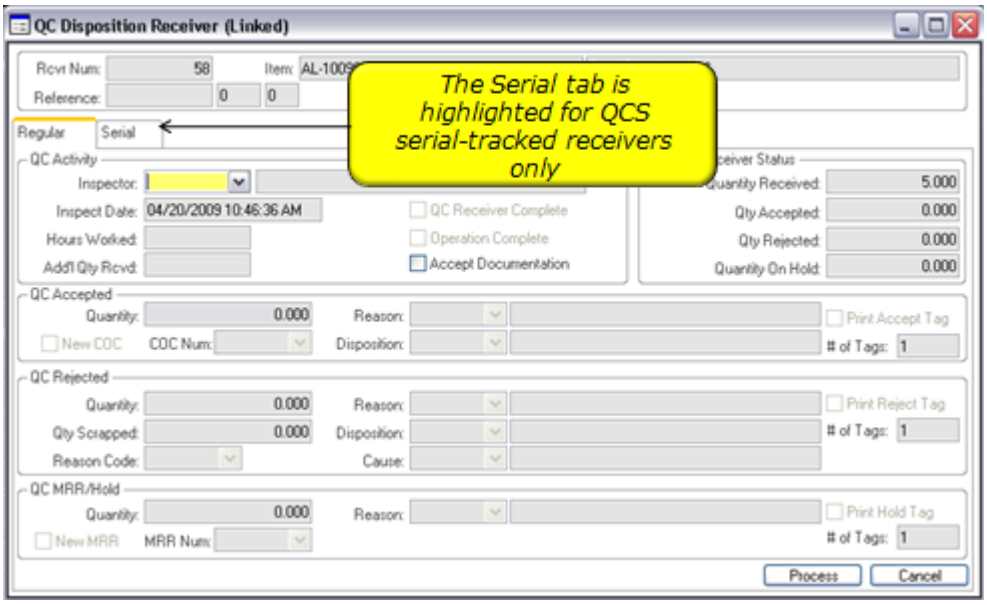
The QCS product allows you to track serial numbers that are internal to QCS only (e.g. not SyteLine serial numbers). This allows test results and dispositioning information to be stored by a specific item/serial number – but without the need to track serial numbers for this item throughout SyteLine.

An item can be set up for QCS Serial tracking using the QC Items form:



Once a QCS item is set up with the 'Serial Tracked' field selected, any receivers created from that point on will require that QCS Serial Numbers be created to record disposition or test results. Please note that QCS serial numbers are not associated with SL serial numbers.

Below is a sample of the QC Disposition Receiver form, as it will look for a receiver that is marked for QCS Serial Tracking:

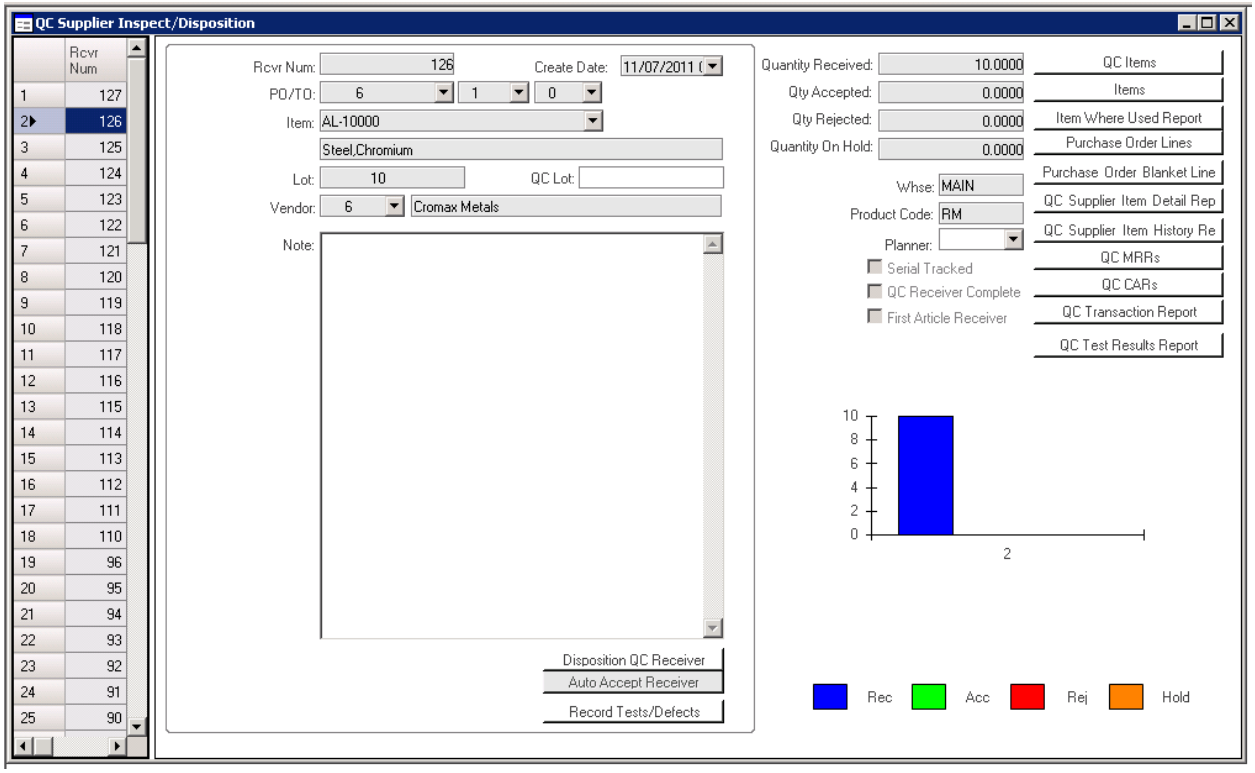


The user will have access to the Serial tab only for receivers marked for QCS Serial tracking. When an item is serial tracked in QCS, the Quantity fields are disabled. Quantities are entered on the Serial tab. Details about how to use this tab are found in the QC Disposition Receiver section, starting on (page *123)*.

Record Receiver Disposition and Test Results

To record the disposition of a receiver, or to enter test results, the user will access the QC Supplier Inspect/Disposition Form. From here, specific Supplier receivers can be found, their status and quantities checked. Once the desired receiver is found, the user can then access the form to either disposition or record test results against that receiver.

QC Supplier Inspect/Disposition



QC Supplier Inspect/Disposition

DESCRIPTION: Displays (filtered) list of Supplier Receivers. Gives access to disposition or entry of test results/defects for items on the receiver.

Buttons:

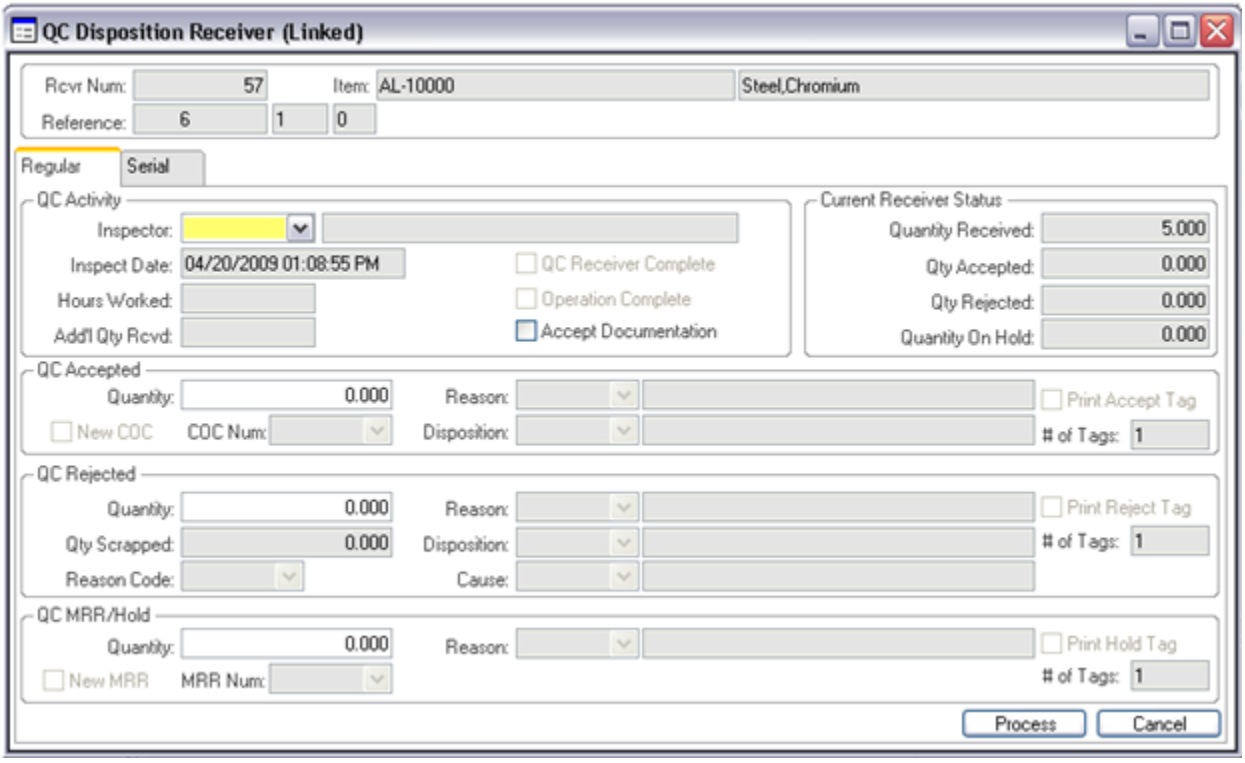
- Disposition QC Receiver: Takes user to QC Disposition form (page *123*) for the current receiver
- Auto Accept Receiver: Automatically accepts the remaining quantity of the item on the receiver.

- Record Tests/Defects: Takes user to Test Result Entry (page *132*) for the current receiver. Only enabled if the current receiver's item has current tests defined.

Notes:

1) **If an MRR has been created for a receiver, the MRR is dispositioned from a different form. Please access the QC MRRs form (page *143*)**
2) **If Inspection/Tests have been created for the item, the 'Record Tests/Defects button will be highlighted. If no tests are set up, the button will be disabled (like shown above).**
3) **If the Supplier Inspect/Disposition form is a First Article receiver, only the Record tests/Defects will be enabled.**

QC Disposition Receiver



QC Disposition Receiver (Linked)

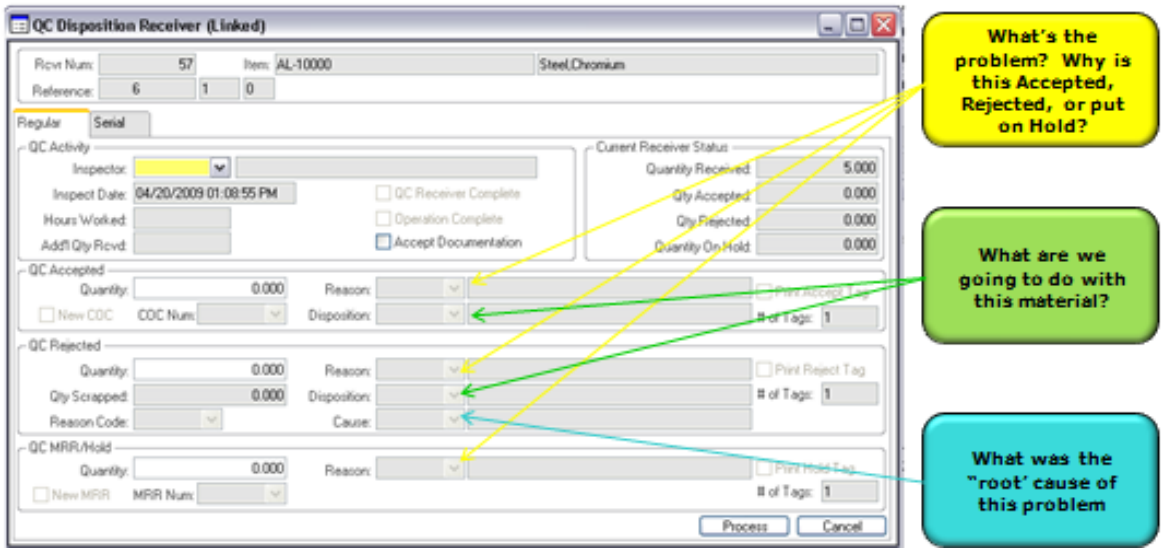
DESCRIPTION: This form is used to enter the disposition for items in QCS for a selected receiver. This form should only be accessed from the QC Inspect/Disposition forms.

Field Descriptions:

Header

Displays the receiver number, Item number, and description, PO/Line/Release, Vendor number and name as applicable for the receiver.

Message: If QC General Parameter 'Check for Test Results' is set to 'Alert-If Defined', a message will be displayed upon entering this form if there are test results defined for this QC Item. If 'Check for Test Results' is set to 'Required-If Defined' and there are test results defined for this QC Item, you will not be able to enter a disposition until/unless there is at least one test result recorded for the receiver. If 'Check for Test Results' is set to 'Required-Always', you will not be able to enter a disposition until/unless there are test results recorded for this receiver.



Regular Tab

QC Activity

- Inspector: If QC General Parameter 'Inspector Validation' is set to 'None', no inspector number is required. If the parameter is set to 'Employee', you must enter a valid employee number. The employee name will display. See also Map Inspector to Receiver on the QC General Parameters Form
- Inspect Date: Displays the system date/time
- Hours Worked: Disabled for Supplier Receivers
- Add'l Qty Rcvd: Disabled for Supplier Receivers

- QC Receiver Complete: Disabled for Supplier Receivers. Automatically set by the system
- Operation Complete: Disabled for Supplier Receivers
- Accept Documentation: User defined

Current Receiver Status

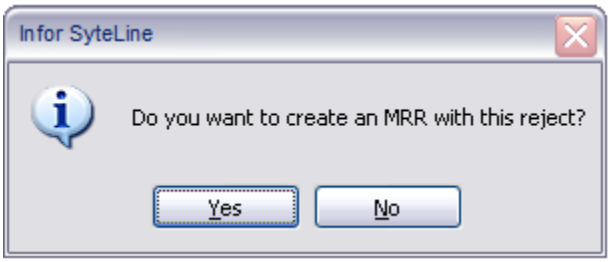
- Quantity Received: Displays the quantity received into QC for this receiver
- Quantity Accepted: Displays the quantity accepted to date
- Quantity Rejected: Displays the quantity rejected to date
- Quantity On Hold: Displays the quantity on hold to date

QC Accepted

- Quantity: Enter the quantity to accept for this transaction
- Reason: If the QC General Parameter 'Prompt For Reason On Accept' is checked, and a non-zero QC Accepted quantity is entered, enter a valid QC Reason; its description will display. If 'Prompt for Reason on Accept' is not checked, the system will default to and display the first Reason for Supplier/Accepted, and it cannot be changed.
- Disposition: If a non-zero QC Accepted quantity is entered, enter a valid Disposition; its description will display.
- Print Accept Tags: If a non-zero QC Accepted quantity is entered, check box if you wish to print 'Accept' tags for this transaction, uncheck box if you do NOT wish 'Accept' tags for this transaction. Value defaults from QC Supplier Parameter 'Default for QC Supplier Tags'.
- # of Tags: If a non-zero QC Accepted quantity is entered, and Print Accept Tag is checked, enter the number of 'Accept' tags to be printed for this transaction. Defaults to 1
- New COC: Disabled for Supplier Receivers
- COC Num: Disabled for Supplier Receivers

QC Rejected

- Quantity: Enter the quantity to reject for this transaction. If the value in QC Supplier Parameter 'Create MRR for Reject' is set to 'Prompt' – a message box will appear asking if you want the reject quantity to create an MRR:



  If 'Yes'; the quantity will be moved to QC Hold and processed as such (see below). If the QC Supplier Parameter 'Create MRR for Reject' is set to 'Always' – the quantity will ALWAYS be moved to QC Hold and processed as such (see below). If set to 'Never', the quantity will stay in the QC Rejected area

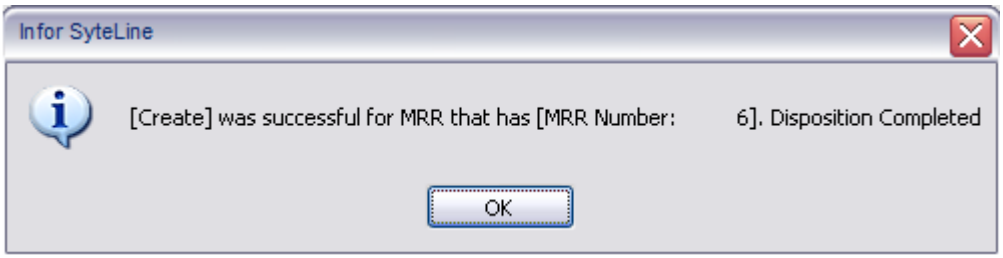
- Qty Scrapped: Disabled for Supplier
- Reason Code: Disabled for Supplier
- Reason: If the QC General Parameter 'Prompt for Reason on Reject' is checked, and a non-zero QC Rejected quantity is entered, enter a valid QC Reason; its description will display. If 'Prompt For Reason on Reject' is not checked, the system will default to and display the first Reason for Supplier/Rejected, and it cannot be changed
- Disposition: If a non-zero QC Rejected quantity is entered, enter a valid Disposition; its description will display
- Cause: If a non-zero QC Rejected quantity is entered, optionally enter a valid Cause; its description will display
- Print Reject Tag: If a non-zero QC Rejected quantity is entered, check box if you wish to print 'Reject' tags for this transaction, uncheck box if you do NOT wish 'Reject' tags for this transaction. Value defaults from QC Supplier Parameter 'Default for QC Supplier Tags'
- # of Tags: If a non-zero QC Rejected quantity is entered, and Print Reject Tag is checked, enter the number of 'Reject' tags to be printed for this transaction. Defaults to 1

QC MRR/On Hold

- Quantity: Enter the quantity to put on hold for this transaction
- Reason: If the QC MRR/On Hold Quantity is non-zero, enter a reason code for Supplier/QCHOLD
- Print Hold Tag: If a non-zero QC MRR/On Hold quantity is entered, check box if you wish to print 'QCHOLD' tags for this transaction, uncheck box if you do NOT wish 'QCHOLD' tags for this transaction. Value default from QC Supplier Parameter 'Default for QC Supplier Tags'
- # of Tags: If a non-zero QC MRR/On Hold quantity is entered, and Print Hold Tag is checked, enter the number of 'QCHOLD' tags to be printed for this transaction. Defaults to 1
- New MRR: If a non-zero QC MRR/On Hold quantity is entered, either a new MRR must be created for the MRR quantity, or the quantity must be added to an existing MRR for this receiver. If you want to create a new MRR, this box should be checked. If not checked, MRR Num must have a valid MRR number. Defaults to checked
- MRR Num: Select an existing MRR for this receiver. Current quantity MRR/On Hold will be added to that MRR. If there are no existing MRRs for this receiver, New MRR must be checked.

Buttons:

- Process: Disposition Accepted/Rejected/MRR for the receiver. A 'Disposition Completed' message will display when processing is done. If an MRR is created, and you are set up to send e-mails using the event system:
  - if you are set to prompt for e-mail, you will receive a prompt, if yes (or if you are coded to Always send the e-mail) the e-mail will be constructed and sent to the E-mail Address value that is in the event system forms. This utilizes the event system so it is dependent on your configuration of standard SyteLine events.
  - If you do not have the parameters to prompt or send an email then no email will be sent.
- Also, if an MRR was created as a result of this transaction, the message will additionally show the new MRR number:



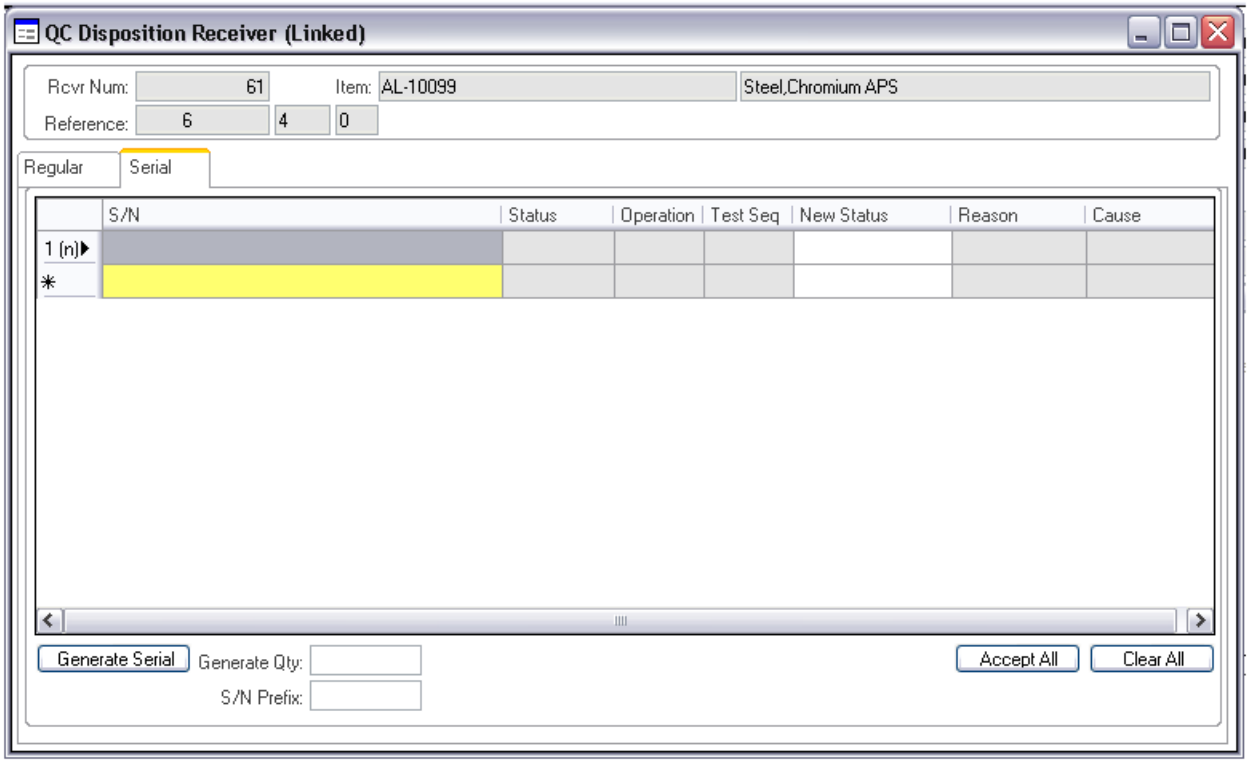
- Cancel: Exit the form without processing

Note:

1) **If you disposition more than you receive, a message will advise and ask if you want to continue.**

If the receiver being dispositioned is marked for QCS Serial Tracking, several changes occur to the Disposition form.

- On the 'Regular' Tab (see above), the user will not have access to the QC Accepted Quantity, QC Rejected Quantity or the QC MRR/Hold Quantity.
- The 'Serial' Tab will be enabled.
- A QCS Serial number must be generated for each item on the receiver. Each QCS Serial Number will be individually dispositioned, and the quantities will be added up and loaded into the 'Regular' Tab quantity fields.
- Once the QCS Serial numbers have been dispositioned, the user must return to the 'Regular' tab to choose the appropriate Disposition/Reason/Cause Codes and process the disposition.



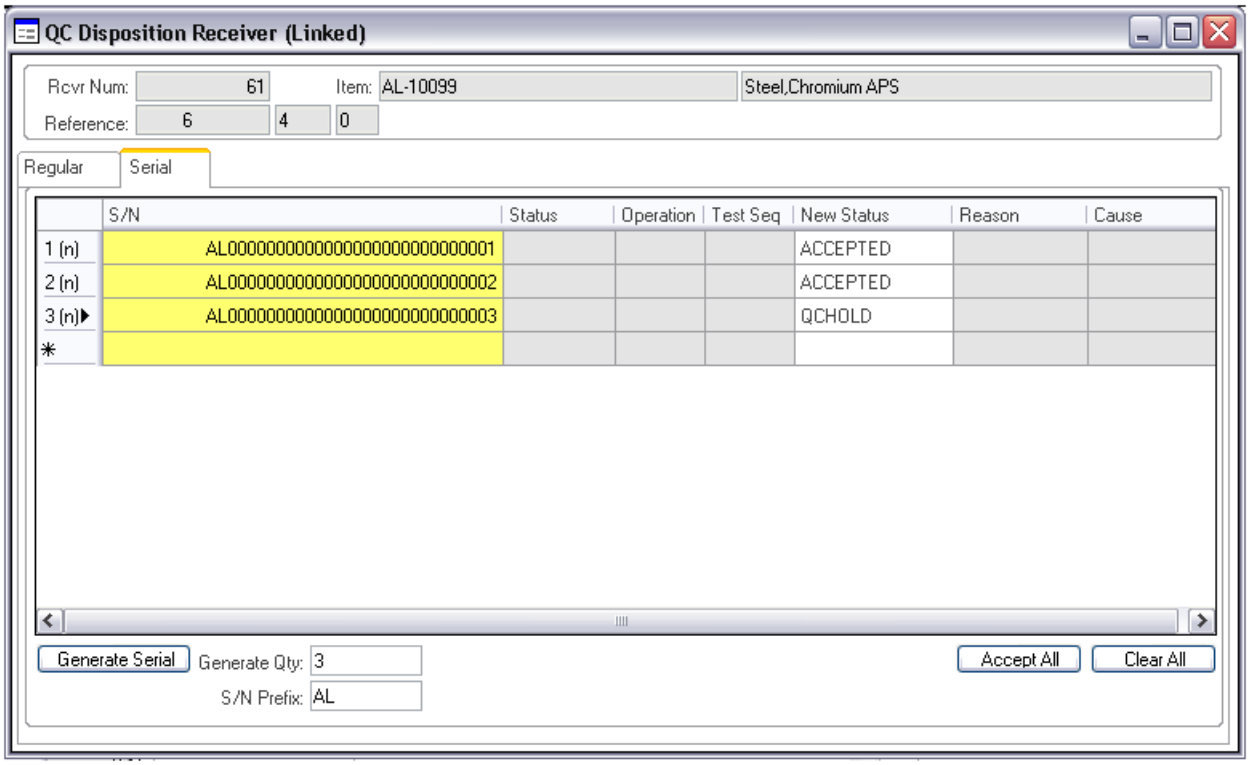
Serial Tab

- Generate Qty: If additional QCS Serial Numbers are required, enter the number to create
- S/N Prefix: If desired, enter the QCS Serial Number prefix to be used for the numbers to be generated
- <Generate Serial> Button: creates new QCS Serial Numbers for this receiver based on the parameters entered (above). When new QCS Serial Numbers are created, they are assigned a status of 'Received'

Serial Grid

- S/N: QCS Serial Number. New serial numbers can be generated (see above), or typed manually
- Status: (Starting) status of this QCS Serial Number for this transaction
- Operation: Not applicable for the Supplier module
- Test Seq: Not applicable for the Supplier module

- New Status: Enter new status of the associated QCS Serial Number, or select from drop-down box
- Reason: Display only
- Cause: Display only



- Accept All: Mark all QCS Serial Numbers with a status of 'Received' to a status of 'Accepted'
- Reject All: Mark all QCS Serial Numbers with a status of 'Received' to a status of 'Rejected'

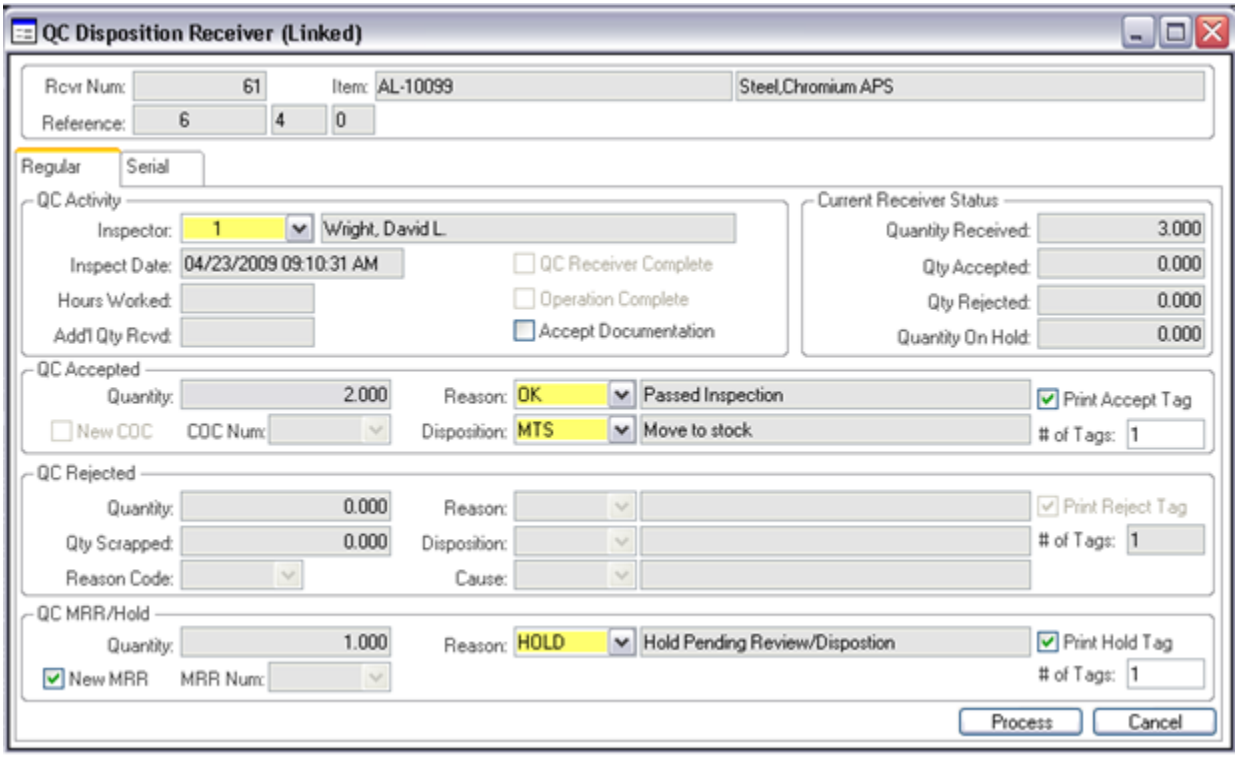
Note:

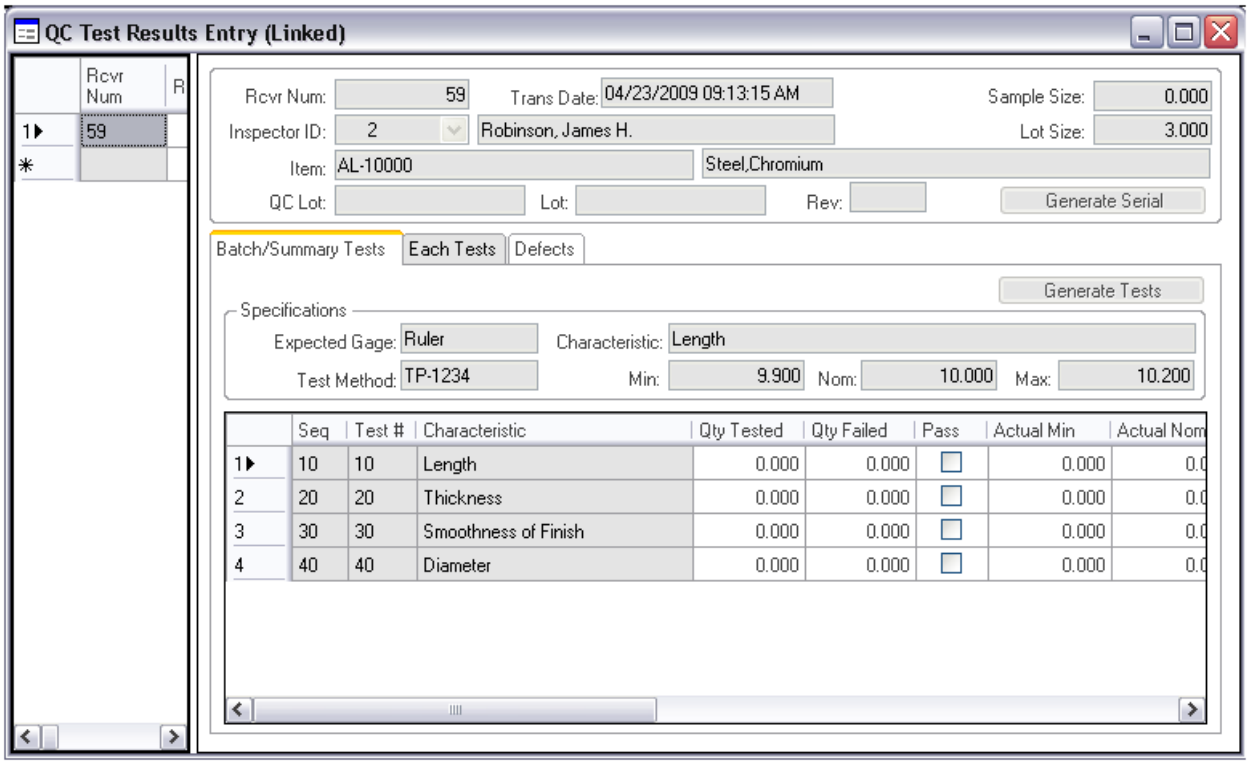
1) **To reverse the effect of a previous disposition transaction, you may change the New Status of a serial number BACK to RECEIVED. This will accumulate as a 'negative' against the original status.**

When you are done marking the status (Accepted, Rejected, QCHold, Received), return to the 'Regular' Tab. You will see the total of each status in the Qty Accepted, Rejected, MRR/Hold fields. You can now indicate the Reason, Disposition and Cause codes for each status.

If you wish to set a different reason code, that serial number needs to be dispositioned in a separate transaction (similar to a Miscellaneous Receipt transaction for material).

All other functionality remains the same on this tab, for a serial-tracked receiver.





QC Test Results Entry (Linked)

DESCRIPTION: Enter the results of the tests specified for this QCS Item. Multiple sets of test results can be created for a receiver.

Field Descriptions:

Header

- Rcvr Num: QCS Receiver number displays
- Trans Date: Defaults to and displays current date for new test sets
- Inspector ID: Employee number of the person performing the inspection, name displays
- Item and Description of item receiver displays
- QC Lot: User defined
- Lot: User defined
- Rev: User defined

- Sample Size: User defined
- Lot Size: User defined
- Generate Serial: Only active if the QC Item is QC Serial tracked. Used when having the system generate sequential serial numbers for recording test results.

Batch/Summary Tests

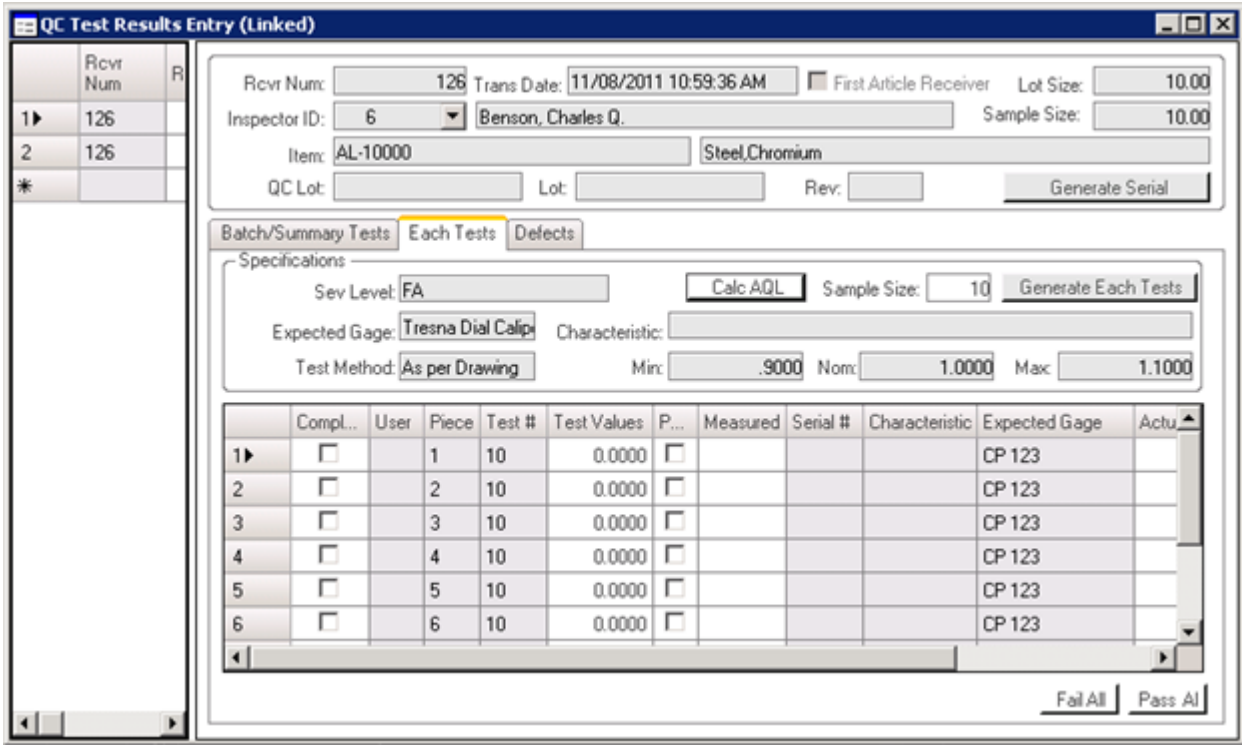
Specification

Expected Gage, Test Method, Characteristic, Expected Minimum, Maximum and Nominal values are all set based on the test (Item detail). The detail data displays based on the current test selected in the browser.

Browser

- Seq: Order which inspections are to be performed
- Test #: Unique test ID number
- Characteristic: Description (see QC Item Test Setup)
- Qty Tested: Enter value
- Qty Failed: Enter value
- Pass: Optional. Check for 'pass' or leave unchecked for 'fail'
- Actual Min: Enter value
- Actual Nom: Enter value
- Actual Max: Enter value
- Gage Group: Display only (see QC Item Test Setup)
- Gage Expired?: Display only (see QC Item Test Setup). Checked if the expected gage shows as expired.
- Expected Gage: Display only (see QC Item Test Setup)
- Desc: Display only description of the gage
- Actual Gage: Use the drop down menu to select an alternate gage as the actual gage used

- Desc: Displays only if an Actual Gage was selected. The field is updated when the test record is saved.
- Measured: Enter optional text information
- Test Method: Display only (see QC Item Test Setup)



Each Tests

Note: this option is required if the receiver is QCS serial-tracked

Specification

Expected Gage, Test Method, Characteristic, Expected Minimum, Maximum and Nominal values are all set based on the test (Item detail). The detail data displays based on the current test selected in the browser.

Calc AQL

The Calc AQL button will calculate the sample size if the following have been previously set up:

- Calculate AQL for Tests has been selected in the QC Enterprise parameters (see page *75*)
- The QC Sampling Criterias Form has been filled out (see page *98*). Remember this form sets the number of completed receivers that the system will use to sum the

number of rejected parts. The values in this form are then used by the system to determine if Loosened, Normal or Tightened sampling rates will be used.

- The QC Test Plan Sampling Rates from has been filled out (see page *99*). Remember the system uses this form to determine the percentage of the quantity received for calculating the AQL sample size.

Notes:

1) **When the Calc AQL button is selected it will enter the Sample Size based on the system calculations outlined above**
2) **The Sample Size is a suggested size and it may be changed prior to selecting the Generate Each Tests button**
3) **If there are not enough closed receivers to meet the settings in the QC Sampling Criterias Form then the Tightened Sampling Plan is used by the system.**

Browser

➢ Complete: When checked, this designates that specific test as being completed and changes the rest of the row to read only. This box is manually checked and unchecked. If there are user initials associated with the person who is logged in, then when checked, the User box will also be populated with the User initials. The complete designation is used for filtering purposes for some reports (SPC reporting) to distinguish tests that failed but are complete, from tests that were never performed.

➢ User: Is auto-populated with the logged in user's initials when a specific test is marked as complete. This can be used to have different users complete different tests on the same QC Rest Results Entry form.

➢ Piece: Sample #

➢ Test #: Unique test ID

➢ Test Values: Enter value

➢ Pass: Optional. Check for 'pass' or leave unchecked for 'fail'. If a test result is entered (in Test Values field) and the result is between the minimum and maximum test values, then the Pass box will automatically be checked.

➢ Measured: Enter optional text information

➢ Serial #: Displayed if serial tracked item

- Characteristic: Description (see QC Item Test Setup)

- Expected Gage: Will show the Expected gage that was entered when the test was set up under QC items.

- Actual Gage: Use the drop down menu to select an alternate gage as the actual gage used

- Desc: Displays only if an Actual Gage was selected. The field is updated when the test record is saved.

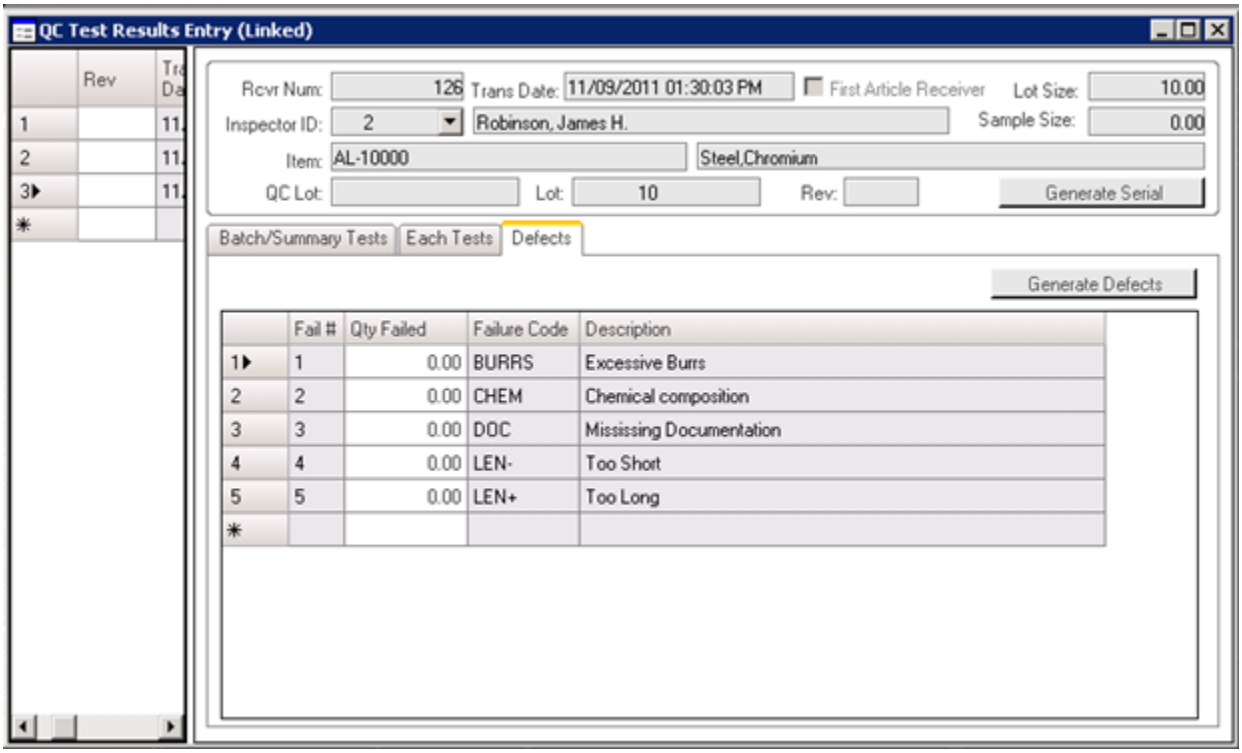
Process:

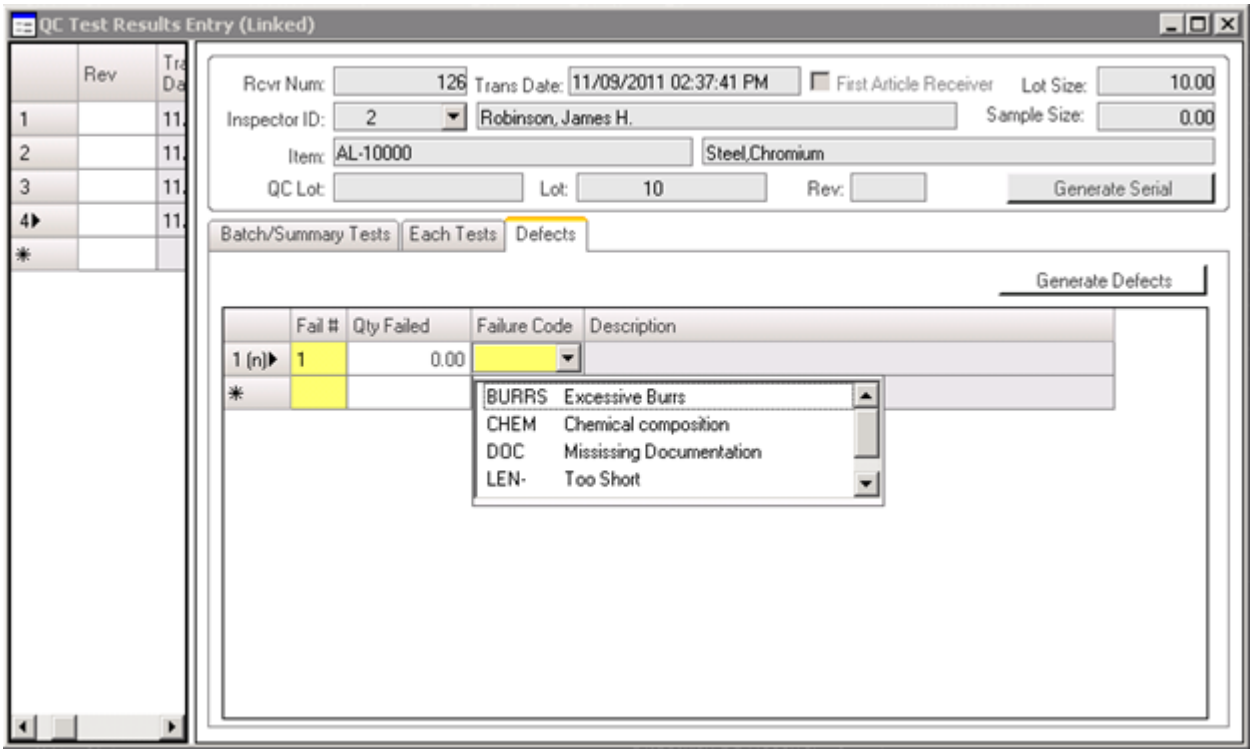
- Enter the inspector ID
- Optionally enter/edit Sample Size, QC Lot, Lot, Rev, and Lot Size
- Select either the Batch or Each Tests
    - If Each is selected:
        - If item is NOT QCS serial tracked, enter the number of entries you wish to have created for each test, OR select the Calc AQL button to have the system enter a recommended Sample Size.
        - If item IS QCS serial tracked, one entry will be created for (and associated with) each serial number that exists for this receiver. If you need to create serial numbers for this receiver, use the <Generate Serial> button.
- Select the <Generate Tests> button
- You will receive a message box: 'Test set creation succeeded' <OK>
- Enter data as required for this receiver

Note:

1) Test results are independent of dispositioning.

QC Test Results Entry - Defects





QC Test Results Entry (Linked) - Defects tab

DESCRIPTION: Enter number of failures per code for this receiver. Please see the QCS Setup Manual for Failure Code setup.

Process:

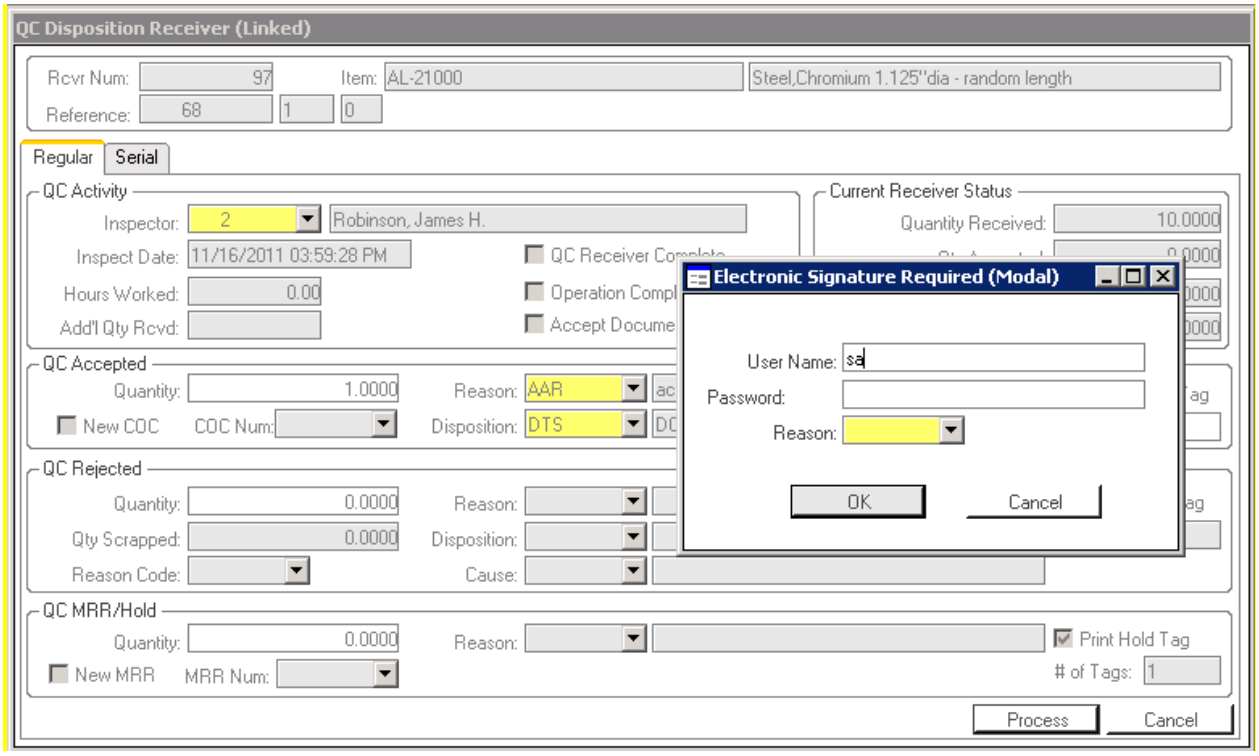
- Access the Supplier Inspect/Disposition form
- Select a Receiver
- Select the <Record Tests/Defects> button
- Select the 'Defects' tab
- Enter an Inspector ID
- There are two different methods to select/enter Defect Quantities:
    - (see the first screen image earlier in this section)Select the 'Generate Defects' button
        - An entry will be created for each Failure code associated with the Supplier Ref Type ('P')
        - Enter the Qty Failed as applicable for this receiver for a given failure code
    - (see the second screen image earlier in this section) Begin to type the defect code into the Failure Code column (or select the drop down arrow)
        - Select the specific Failure code you want and hit enter
        - Enter the Qty Failed.
        - NOTE: This method allows you to select which Failure Codes show and may be easier than creating an entire list of Failure Codes and trying to find only the codes that are relevant for that receiver.

Note:

1) **Defects can only be recorded against QC Items with at least one Test defined.**

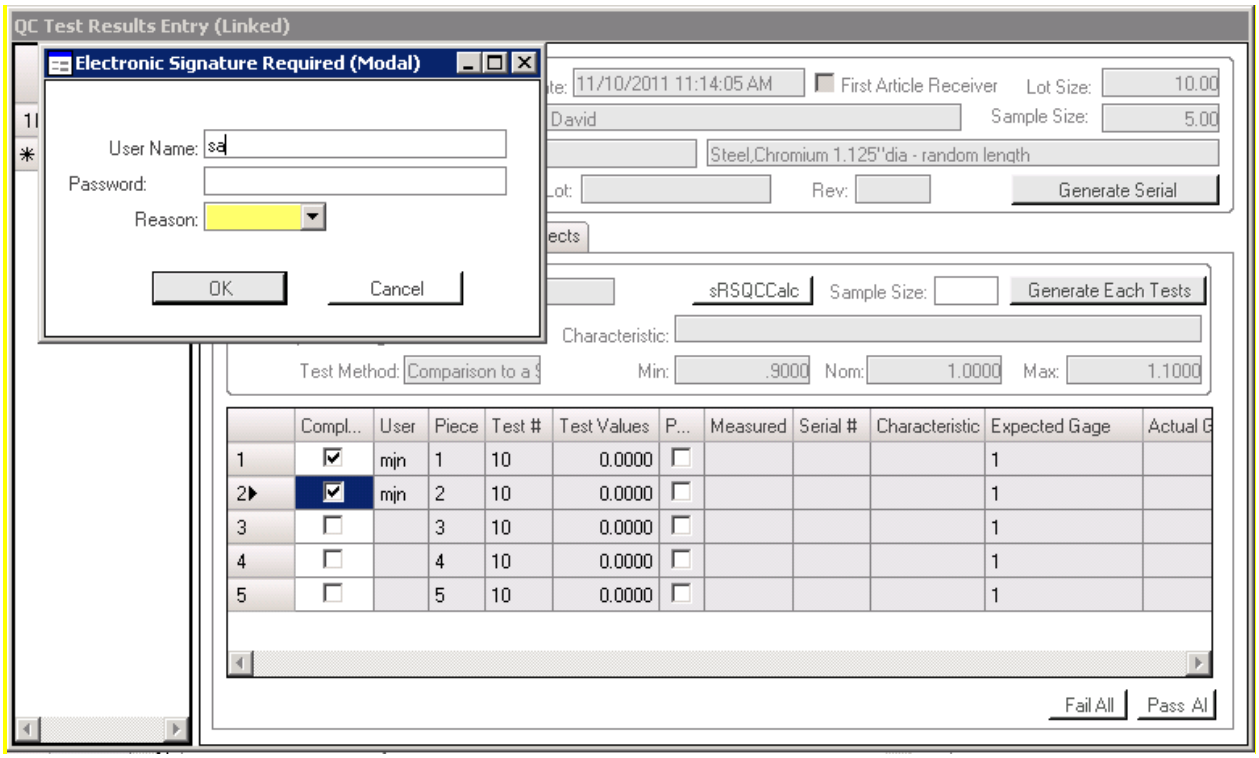
Using Electronic Signatures in QCS

Once Electronic Signatures are turned on and user(s) are authorized, you can now use the functionality (See page *219*). Upon pressing Process during a receiver disposition or MRR disposition, you will see the Electronic Signature Required box;



You must fill in the user name and password of an authorized signer (you do not have to use the user name and password of the logged in user; any authorized signer may fill this in.), and you must select an electronic signature reason code.

Similarly, when recording Each Tests, if electronic signatures is enabled, the signature box will display when checking or unchecking the “Complete” check box in the test results grid;



Notes:

1) **This functionality is only available if you are running Infor SyteLine version 8.03 or later.**
2) **Please refer to the Infor SyteLine version 8.03 or later documentation for electronic signatures for additional information and best practices.**

There are several options for handling material that is non-conforming, or needs additional testing/review:

Method 1

The material may be immediately dispositioned as REJECTED. The appropriate reason code, disposition code and cause codes are recorded for the transaction. Where desired (and as coded), a Material Move or Material Issue can then be run for the rejected items.

Method 2

When identifying a quantity as REJECTED while dispositioning, you can set the parameters to ask the user if they wish this particular set of rejected items to be moved to an MRR. If so, the items will be put ON HOLD, and either applied to an existing MRR, or a new MRR will be created. If moved to an MRR, final disposition must be made from the MRR.

Method 3

The material may be dispositioned as MRR/ON HOLD. These items can be added to an existing MRR for this receiver, or a new MRR can be created. Final disposition must be made from the MRR.

Notes:

1) **An MRR can only be created during the disposition of a Receiver for a QC item, or via the Quick MRR/Receiver Utility (based on parameter settings).**
2) **Creating an MRR does not move material.**
3) **Final disposition of the material from the MRR can move material, based on your disposition code(s).**
4) **Once an MRR is created, it cannot be deleted.**
5) **An MRR is linked to one and only one receiver.**

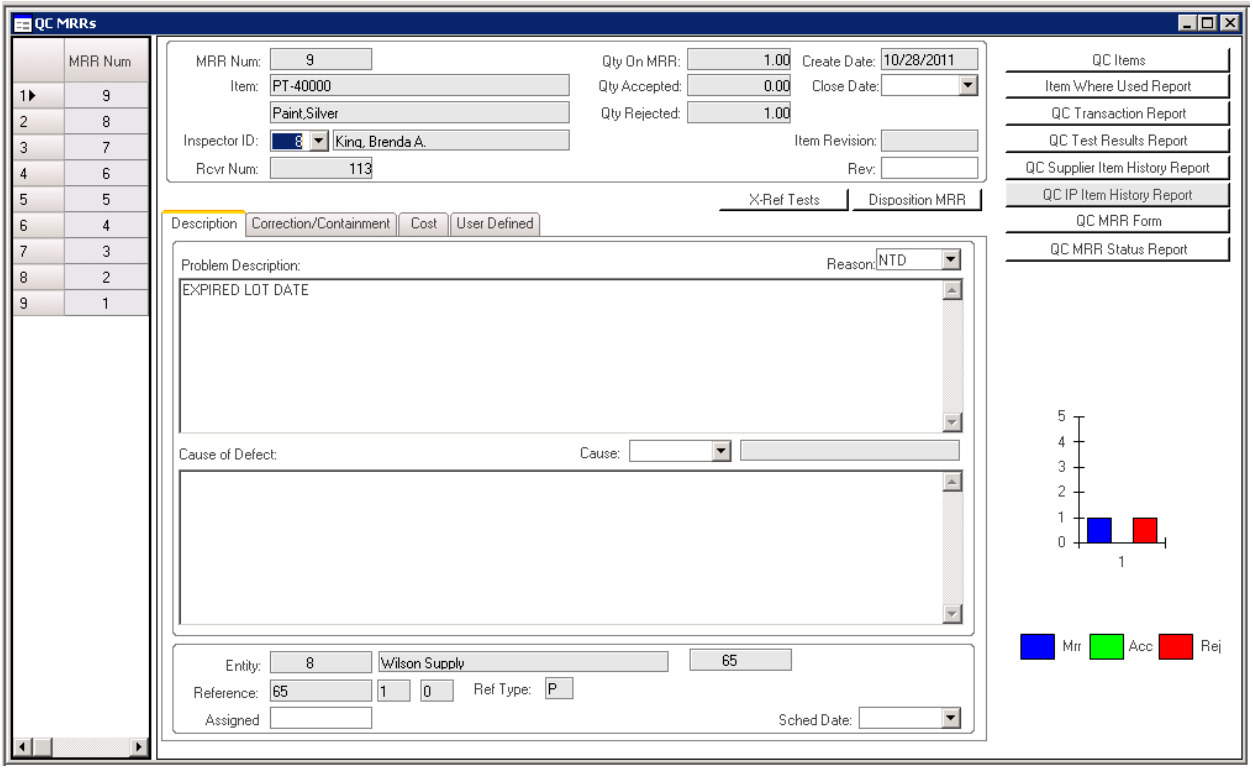
6) **Multiple MRRs can be created for one receiver.**

7) **MRR numbers are system-generated.**

Using one or more of the above methods, a process will be set up to incorporate QC into your current or new process flow for non-conforming material. A typical flow might be:

1) Discrepant material is identified and entered into QCS as rejected or MRR/On Hold, creating an MRR.
2) A designated individual is responsible for notifying the appropriate people (e.g. members of a Material Review Board/MRB) of the issue, and calls a meeting to address the MRR.
3) The MRB meets and decides either a) on a disposition or b) assigns someone to investigate and schedule a follow-up meeting for final disposition (this may result in the generation of a CAR to ensure that the cause of this incident is corrected to prevent a reoccurrence)
4) The discrepant material is dispositioned
5) The MRR is completed

QC MRRs



QC MRRs

DESCRIPTION: Form is used to edit values on MRRs. No add or delete is allowed.

Field Descriptions:
Header

Displays the MRR #, Create Date, Ref Type, Item Number and Description, Receiver #, Quantity on the MRR, MRR Quantity Accepted, MRR Quantity Rejected

- Close Date: Enter a date to indicate there will be no further action on this MRR. Clear date to re-open the MRR
- Item Revision: is the SyteLine Item revision and is read only
- Rev: User defined

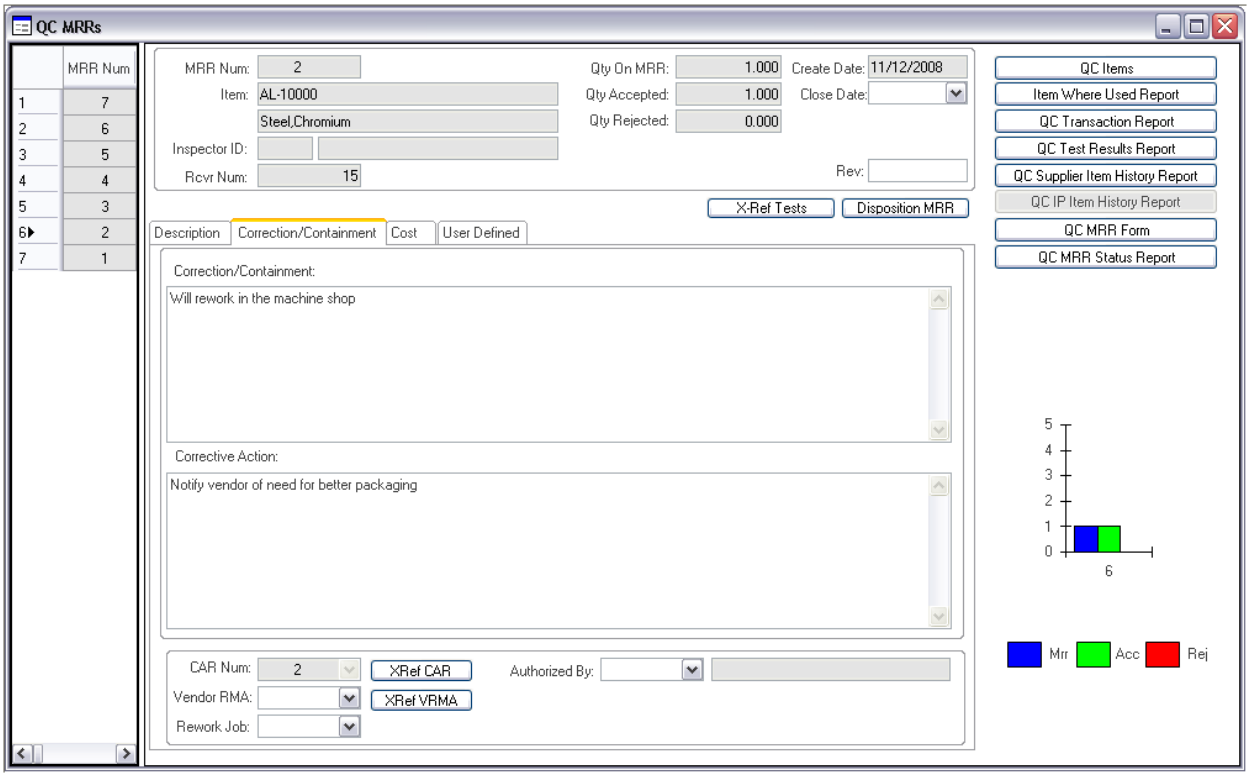
Descriptions Tab

Displays vendor number and name (Entity), if the receiver references a vendor, and the PO Num/Line/Release (Reference), if the receiver references one

- Problem Description: User defined (400 characters). You may enter more than 400 characters, however; the MRR only prints the first 3 lines.
- Reason: Select a reason code
- Cause of Defect: User defined (400 characters). You may enter more than 400 characters, however; the MRR only prints the first 3 lines.
- Cause: Enter a code for the underlying problem which resulted in the MRR being created
- Scheduled Date: User defined
- Assigned to: User defined

Buttons:

- X-Ref Tests: Launches QC MRR Cross Reference Tests (Linked) form. The user can associate test results to the MRR (page 149)
- Disposition MRR Button: Launch QC Disposition MRR form for the current MRR (page *148*)



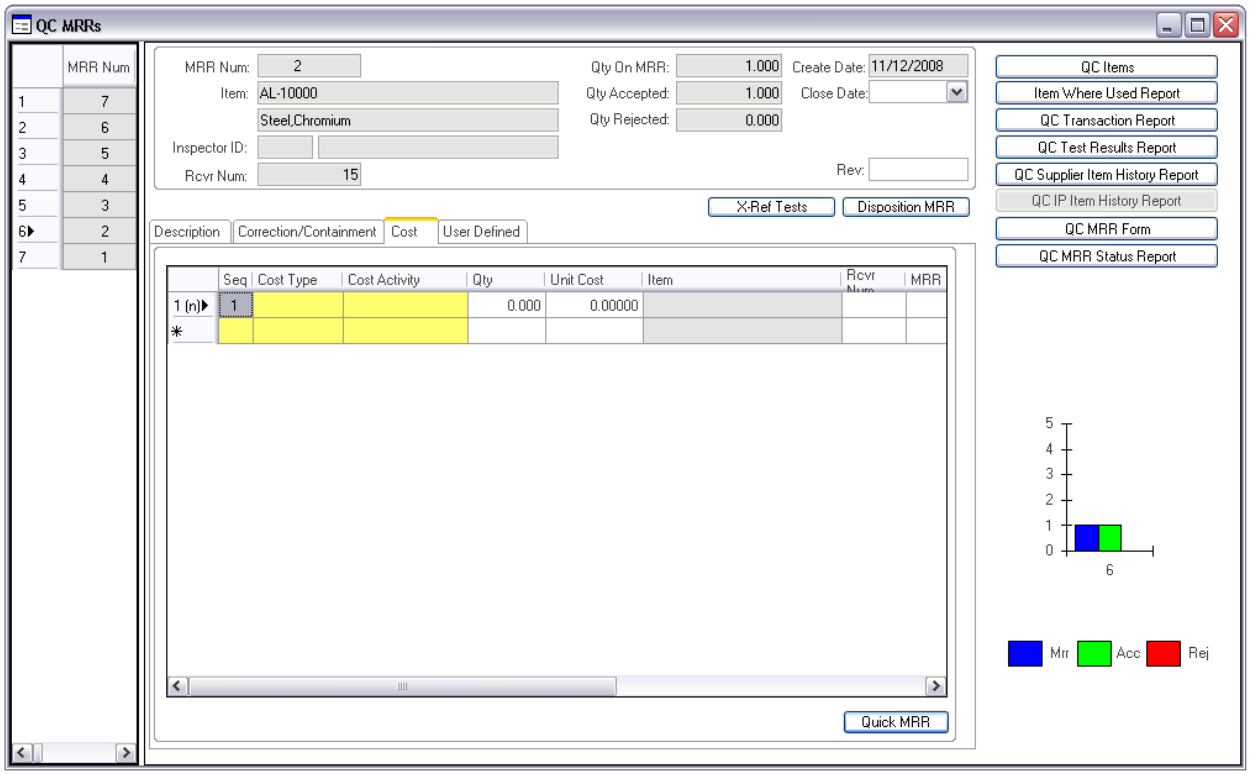
Correction/Containment Tab

- Correction/Containment: User defined (400 characters)
- Corrective Action: User defined (400 characters)
- CAR Num: Displays CAR number if there is one linked to this MRR, user can point this CAR to an existing CAR (if none already is set for this MRR).
- Rework Job: Can be set to an existing SyteLine job. Reference only.
- Vendor RMA: Displays Vendor RMA number if there is one linked to this MRR
- Authorized by: If used, must be an employee number from SyteLine Employees

Buttons:

- XRef CAR: If a CAR is cross-referenced to this MRR, launch the QC CARs form. If no CAR is linked, create a CAR linked to this MRR. When an MRR is created can also select from existing CARs from the pull down list. If a CAR is created, and parameters are set up to do so, an e-mail will be sent
- XRef VRMA: If a Vendor RMA is cross-referenced to this MRR, launch the QC VRMAs form. Immediately after a VRMA has been cross referenced to an MRR the user must select the VRMA from the pull down list. If no Vendor RMA is linked then this button does not have

any functionality. This is only populated after a "RTV" (Return to Vendor) disposition has been completed.



Cost Tab

- Seq: System-generated
- Rcvr Num: If there is an existing QC Receiver related to this MRR, you may enter the number (not validated).
- MRR Num: If there is another MRR related to this MRR, you may enter the number (not validated).
- Item: If there is another item related to this MRR, you may enter it (not validated).
- Cost Activity: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece
- Problem Description: User defined

- Create Date: Set with the system date with this cost entry is created
- Description: User defined

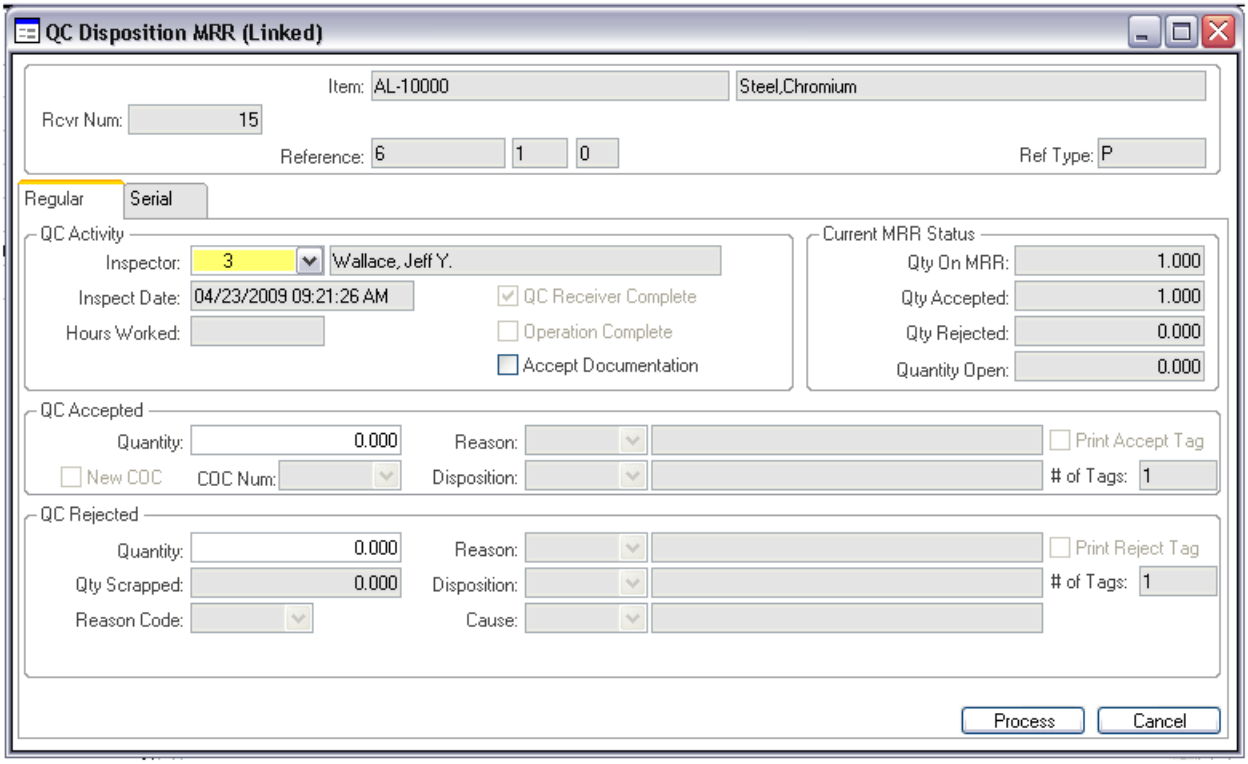
Buttons:

- Quick MRR: Brings up the Quick Receiver/MRR Utility form (see QC Setup Manual)

Note:

1) **MRR costs are not linked with SL financials.**

Disposition Material on an MRR



QC Disposition MRR (Linked) (Disposition MRR button)

Field Descriptions:
Header

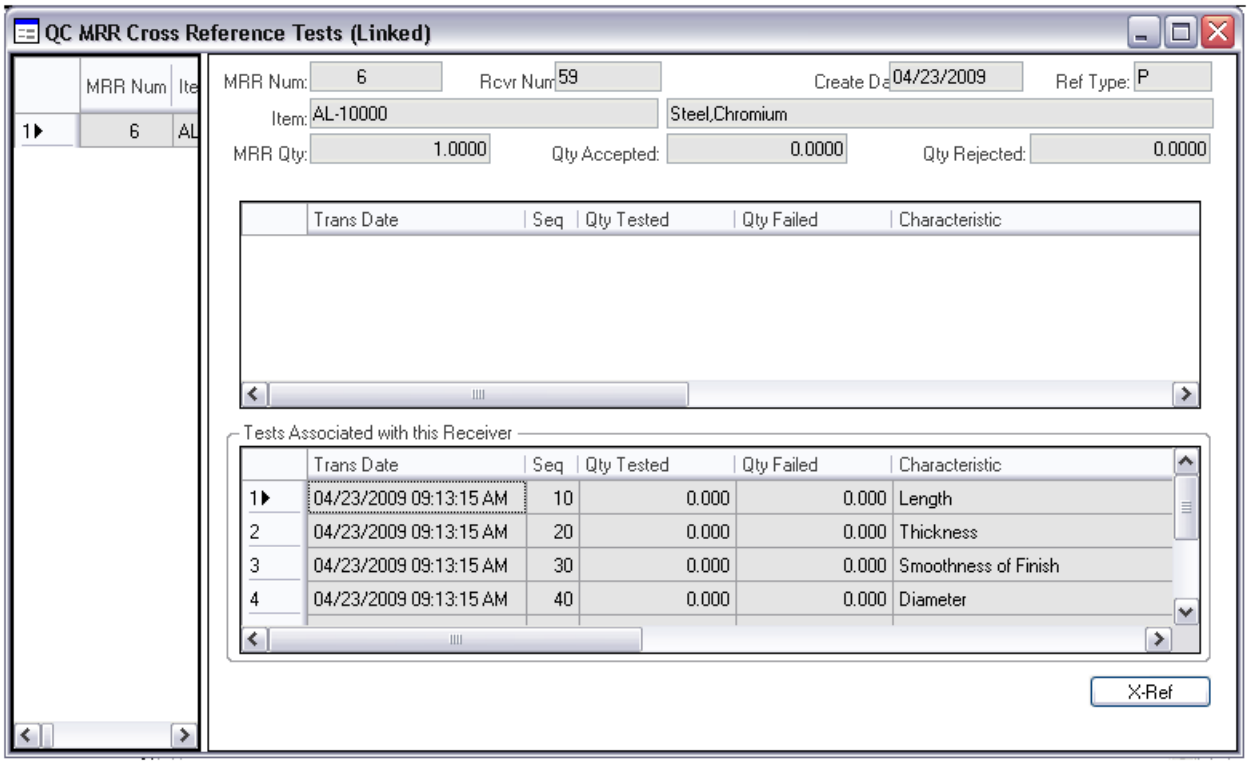
Displays the MRR Num, Item number and description, Rcvr Num, Vendor number and name if applicable, PO number, Line and Release if applicable, and Reference Type.

Test Results: If QC General Parameter 'Check for Test Results' is set to 'Alert-If Defined', a message will be displayed upon entering this form if there are test results defined for this QC Item. If 'Check for Test Results' is set to 'Required-If Defined' and there are test results defined for this QC Item, you will not be able to enter a disposition until/unless there are test results recorded for the receiver. If 'Check for Test Results' is set to 'Required-Always', you will not be able to enter a disposition until/unless there are test results recorded for the receiver.

Please see QC Regular Disposition for details (page *123*).

Differences: This form is only used to disposition from an MRR – you cannot put items on an MRR/On Hold from here (as they are already On Hold). Accepted/Rejected amounts will be applied to the Receiver associated with this MRR (and recorded against the MRR).

Xref Test Results to an MRR



QC MRR Cross Reference Tests (Linked) (Xref Tests button)

Header

Displays detailed information from the MRR.

First browser shows tests associated with the MRR to date (e.g. if empty, no tests from the Receiver are associated with the MRR). In the above example, one test result line (for 04/23/2009) with 10 tested and 0 failed) has been associated with the MRR.

Tests Associated with this Receiver

- Displays all test results associated with the receiver linked to the MRR. To add the test result to the MRR, select the line in this browser, then click the <X-Ref> button. The test should now also display in the upper browser.

Returning Material Against a Purchase Order

- If Receiving rejects all or any portion of a PO receipt in standard SyteLine receiving, that QC material will still go to QC to be received/dispositioned - if it is due for QCS based on the Inspection Frequency and receiving history. If a quantity is 'unreceived' or a Debit Return processed, you may use the Receiver Adjust Utility (if needed) to adjust the quantity on the associated receiver (see the QCS Setup Section of this manual).

- If QC rejects material, the user has the option to use QCS Vendor RMA. This feature can be used for a variety of scenarios: Material return referencing the Original PO, Material return referencing a new PO, Material return referencing no PO.

- Replacement part receipts will generate new QC receivers (depending on the Inspection Frequency that is set).

Vendor Return Material Authorization (VRMA)

The QCS Supplier module provides functionality to aid returning material to a supplier. The Vendor RMA document is created from and linked with a QCS MRR.

There are a wide variety of scenarios supported by the "Return to Vendor" function, including:

1) Send some, all, or none of the material back to the supplier
2) Scrap some, all, or none of the material
3) Receive some, all, or none of the material back from the supplier
4) Receive a credit from the supplier. This credit is independent of the cost of the material on the Vendor RMA, and is also independent of the quantities shipped or received on the Vendor RMA
5) Send the defective material to a third party for repair/rework

QCS Vendor RMA is integrated with the SyteLine Vendor and Item Master files, and can reference a SyteLine Purchase Order. From a material control standpoint, QCS Vendor RMA supports the ability to:

1) Remove material from inventory for return/ship to a supplier, including the appropriate reference paperwork. Material can be returned to the original supplier or to a rework/ repair supplier.
2) Scrap material from Inventory
3) Receive material back from the above supplier, and route it to QC for inspection/ disposition

A QCS Vendor RMA can only be marked as complete when the quantities have been reconciled. For example, that all material expected to be returned has been returned, all material that is expected back has been received back.

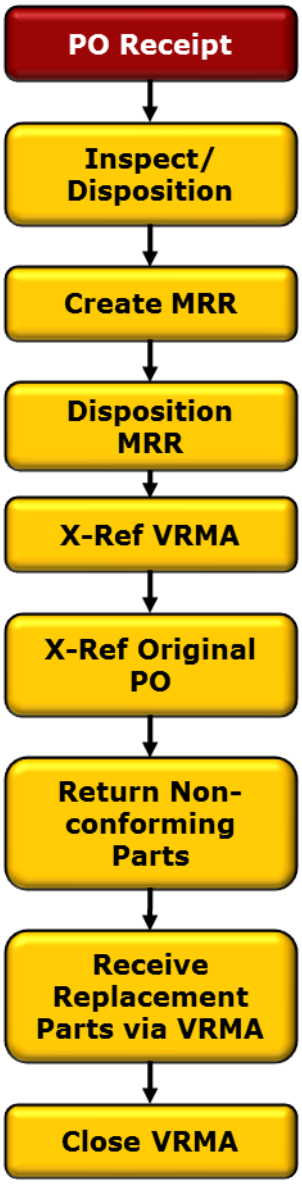
Process Flow:

1) Create a Receiver during Purchase Order Receiving, or manually move material into QCS
2) Identify the non-conforming material and generate an MRR
3) Process the MRR and complete the MRR disposition
4) From the MRR form, select the Xref VRMA button to automatically create a Vendor RMA and link it to this MRR. The quantity on the Vendor RMA defaults from the quantity on the QCS MRR
5) Complete the Vendor RMA transactions as described on the following pages
6) Optionally return material back to the supplier, including printing the Vendor RMA
7) Optionally receive material back from the supplier
8) Optionally scrap material off the Vendor RMA
9) Optionally create an A/P voucher (credit transaction) to reflect any cost adjustments
10) Complete the VRMA and mark closed

Option/Method #1 – Return for Replacements (Reference original PO)

VRMA – Return for Replacements

I. Reference the original PO for replacements.



1) PO Receipt

2) Inspect, Reject, Create MRR

3) Disposition MRR. When rejecting the quantity, Select the Disposition code of RTV – Return to Vendor (NOTE: this must be set up as a QC Disposition Code)

4) After selecting the Process button answer Yes to the prompt “Do you want to create a VRMA for this reject” (or no if you do not want a VRMA)

5) On the Correction/Containment tab of the QC MRR form select the drop down for Vendor RMA and select the just created VRMA

6) Select X-Ref VRMA to open the QC Vendor RMA Maintenance Form

7) Select X-ref Original PO on VRMA

8) Return non-conforming material

9) (Optional) Verify amounts in IC Dist Journal

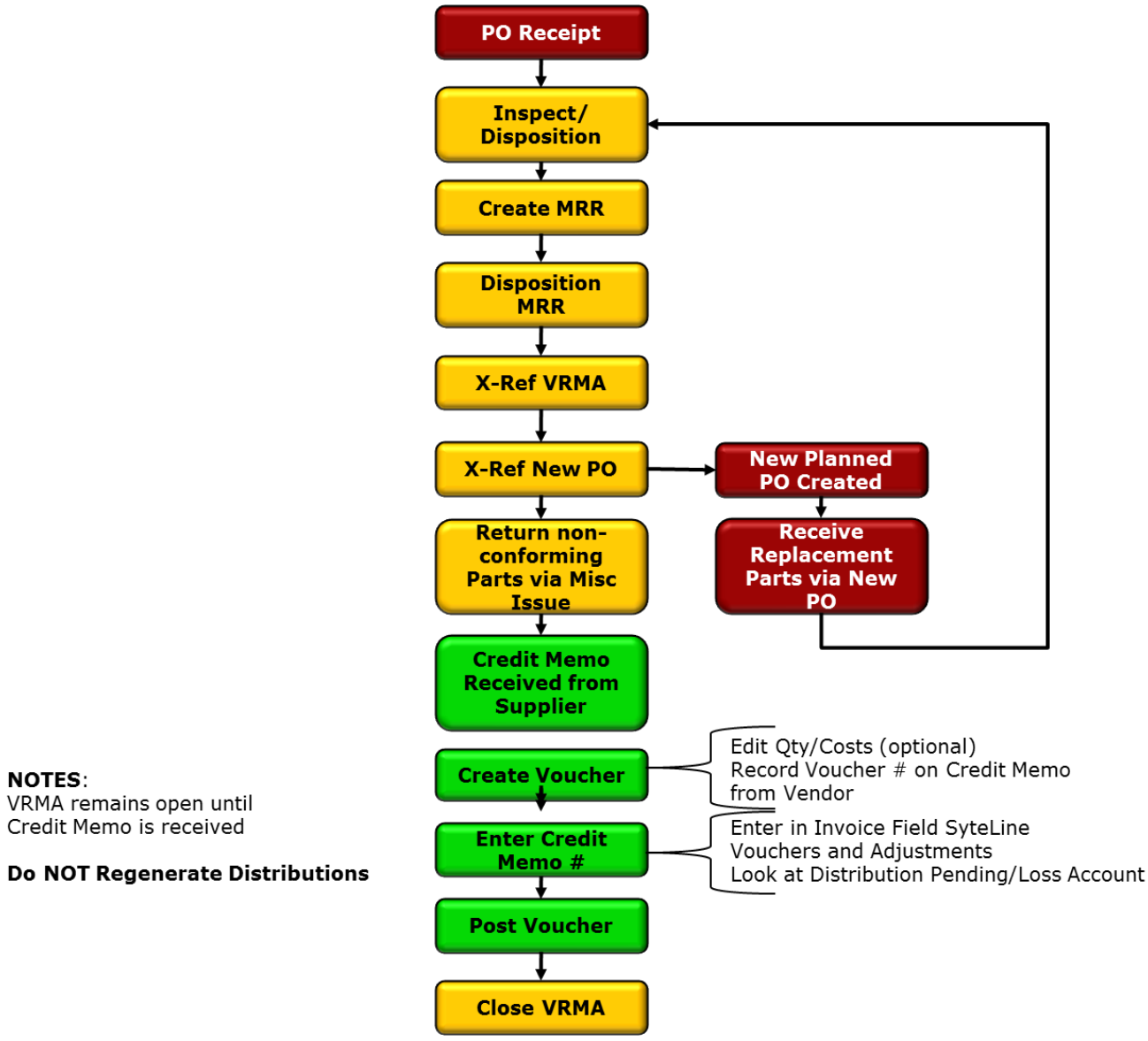
10) Receive Replacements via VRMA

11) Close VRMA

Option/Method #2 – Return for Credit & Replacements on a New Purchase Order

VRMA – Credit & Replacements on New Purchase Order

II. Credit for Returns. Create New PO for Replacements.



1) PO Receipt

2) Inspect, Reject, Create MRR

3) Disposition MRR. When rejecting the quantity, Select the Disposition code of RTV – Return to Vendor (NOTE this must be set up as a QC Disposition Code)

4) After selecting the Process button answer Yes to the prompt “Do you want to create a VRMA for this reject” (or no if you do not want a VRMA)

5) On the Correction/Containment tab of the QC MRR form select the drop down for Vendor RMA and select the just created VRMA

6) Select X-Ref VRMA to open the QC Vendor RMA Maintenance Form

7) X-ref(/Create) New PO on VRMA

8) Return non-conforming material

9) Create Voucher

10) Enter Supplier’s credit memo in SyteLine

11) Vouchers and Adjustments – enter vendor’s Credit Memo # in Invoice Field. (Optionally add freight. Manually create a distribution for the freight)

12) Post Voucher in SyteLine - DO NOT REGENERATE DISTRIBUTIONS

13) Review A/P Distributions (Journal) - relieved A/P from Pending Account

14) Review Vendor Posted Transactions - Summary

15) Review Detail Button (A/P posted trx-detail)

16) Receive Replacements via SyteLine PO Receiving (new receiver created)

17) Close VRMA

Option/Method #3 – Return for Credit only

VRMA – Return for Credit Only

III. Credit for Returns. No replacements

1) PO Receipt

2) Inspect, Reject, Create MRR

3) Disposition MRR. When rejecting the quantity, Select the Disposition code of RTV – Return to Vendor (NOTE this must be set up as a QC Disposition Code)

4) After selecting the Process button answer Yes to the prompt “Do you want to create a VRMA for this reject” (or no if you do not want a VRMA)

5) On the Correction/Containment tab of the QC MRR form select the drop down for Vendor RMA and select the just created VRMA

6) Select X-Ref VRMA to open the QC Vendor RMA Maintenance Form

7) X-ref Original PO on VRMA

8) Return non-conforming material

9) Credit Memo received from supplier in SyteLine

10) Create Voucher

11) Vouchers and Adjustments – enter vendor's Credit Memo # in Inv Field

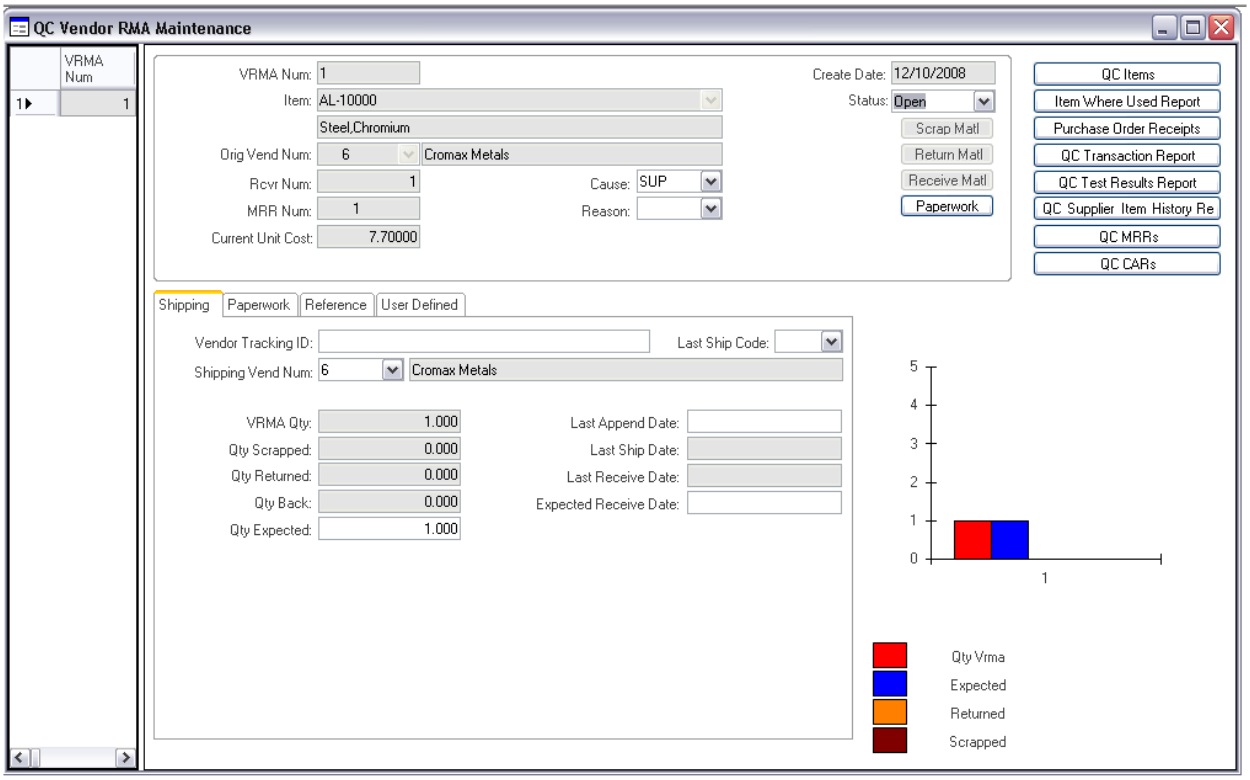
12) Post Voucher in SyteLine - DO NOT REGENERATE DISTRIBUTIONS

13) Review A/P Distributions (Journal) - relieved A/P from Pending Account

14) Review Vendor Posted Transactions - Summary

15) Review Detail Button (A/P posted trx-detail)

16) Close VRMA



QC Vendor RMAs

Field Descriptions:
Header

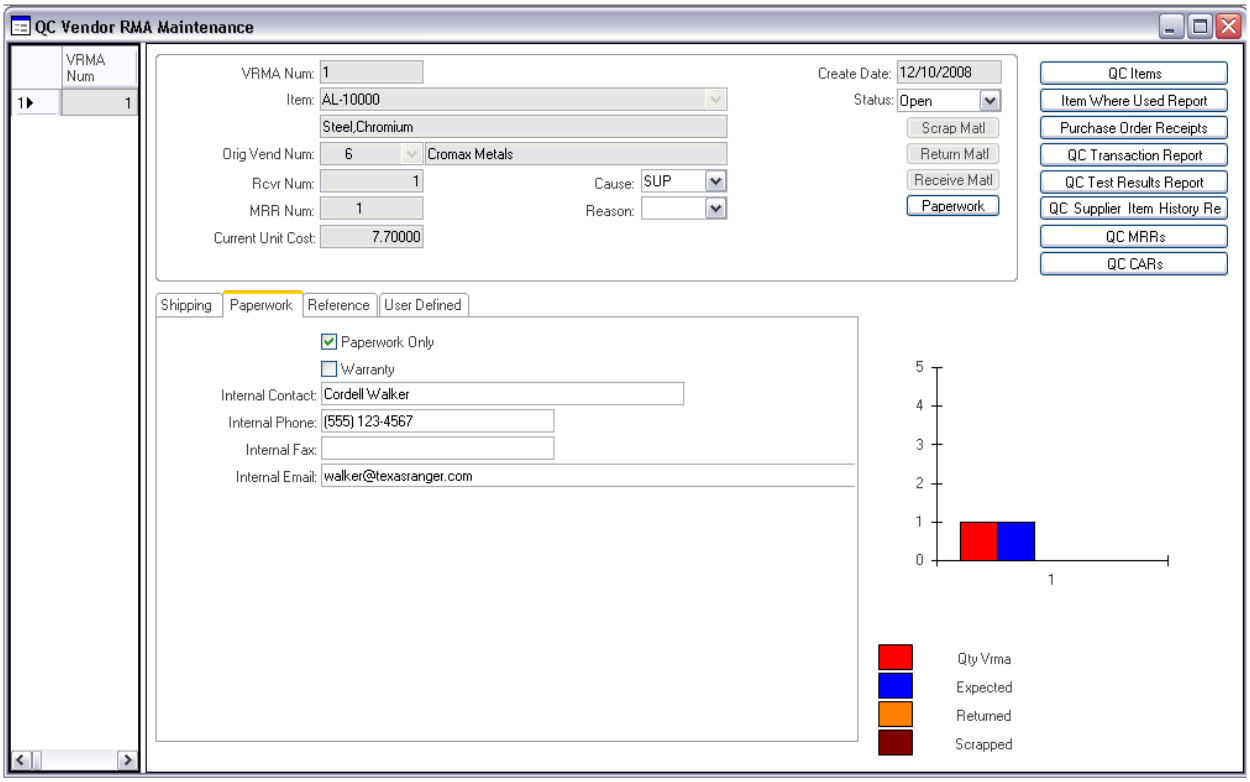
Displays VRMA Num, Create Date, MRR Num, Item, Item's unit of measure, Item's description, Original Vendor Number and Name. Item and Vendor are set from MRR.

Status: Open/Closed, Notification field to enter an email address.

Shipping Tab

- *Vendor Tracking ID: User defined*
- *Shipping Vend Num: Select the Vendor that the non-conforming material will be shipped to.*
- Last Ship Code: Select ship method
- VRMA Qty: Defaults/Displays from Quantity Rejected from the associated MRR
- Qty Scrapped: Displays scrap quantity

- Qty Returned: Displays return quantity
- Qty Back: Displays replacements received
- Qty Expected: Defaults to VRMA quantity
- Last Append Date: User defined
- Last Ship Date: Set based on shipping transactions
- Last Receive Date: Set based on replacements received
- Expected Receive Date: User defined

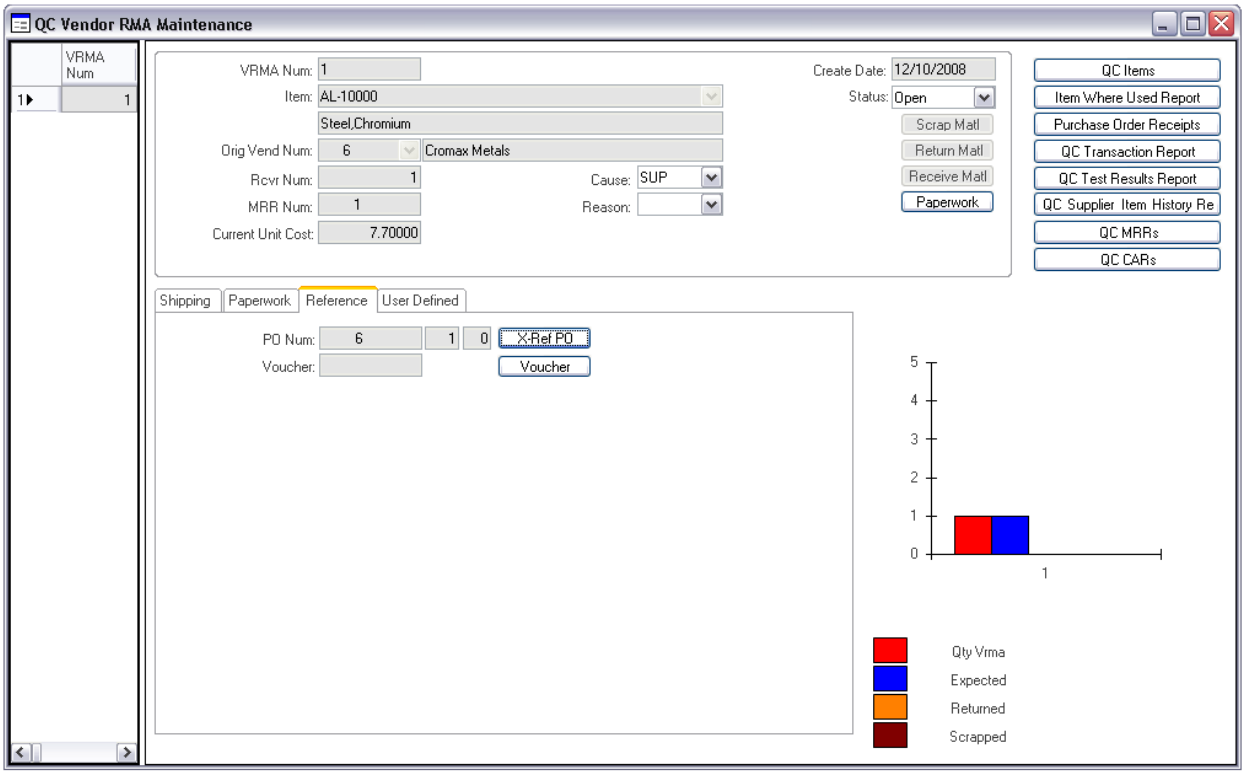


Paperwork tab

- Paperwork Only: If checked will disable the Scrap, Return, and Receive buttons – all that is allowed is to do a VRMA Packing Slip from the 'Paperwork' button. If NOT checked all buttons are enabled, and user can do material transactions AND paperwork.
- Warranty: Yes (checked)/No (unchecked). Appears on the VRMA form
- Internal Contact
- Internal Phone
- Internal Fax
- Internal Email

Buttons:

- Paperwork: Generates a QC VRMA Packing Slip for the current VRMA



Reference Tab

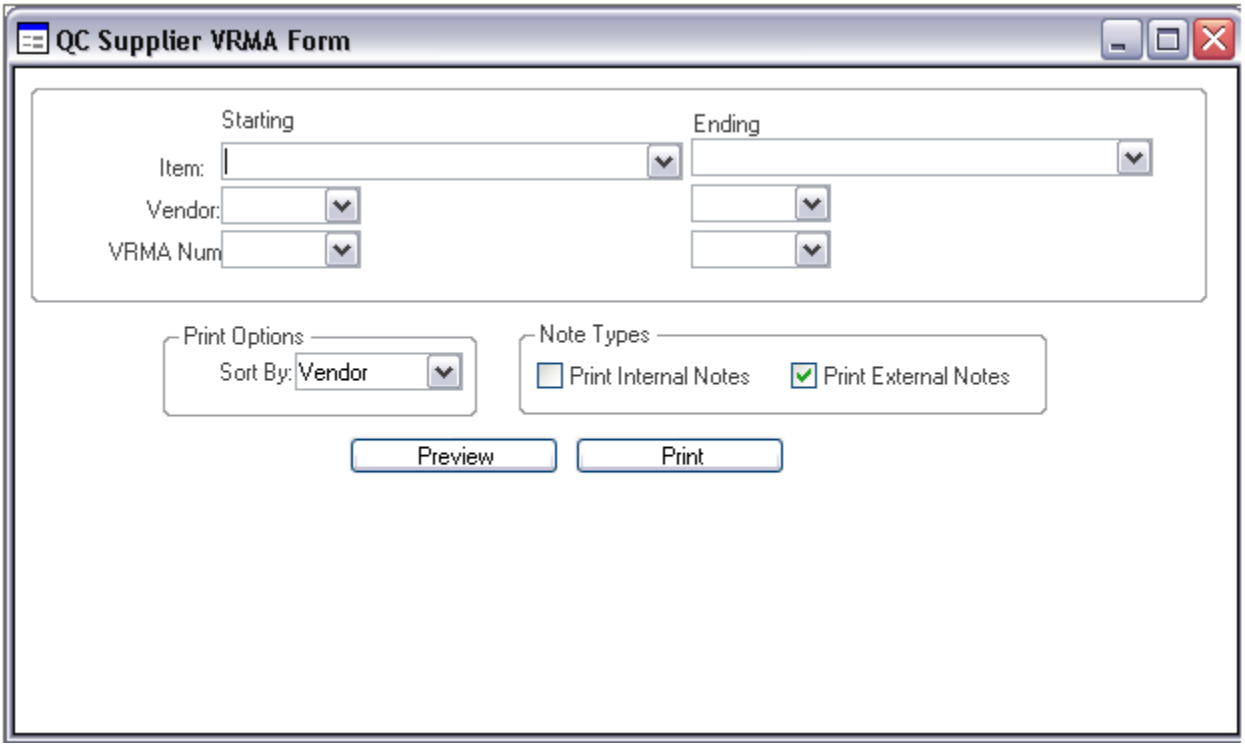
- PO Num: PO that this VRMA will reference
- Voucher: Voucher number associated with this VRMA

Buttons:

- XRef (PO Num): If no PO is associated with the VRMA, system will prompt user whether to create a new PO (if 'Yes', a new PO will be created, if 'No' the original PO will be the reference). Once a PO Num is referenced, this button will launch the Purchase Order form. NOTE: this will not reference a transfer order (TO)
- XRef (Voucher): If no voucher is set, launches form to enter a voucher for this VRMA (page 168)

Print Vendor RMA Form

This form can be printed as a stand-alone document, and in many ways resembles a Purchase Order in SyteLine. This form references all of the information associated with the Vendor RMA.



QC Supplier VRMA Form

Report Options

Starting/Ending Item

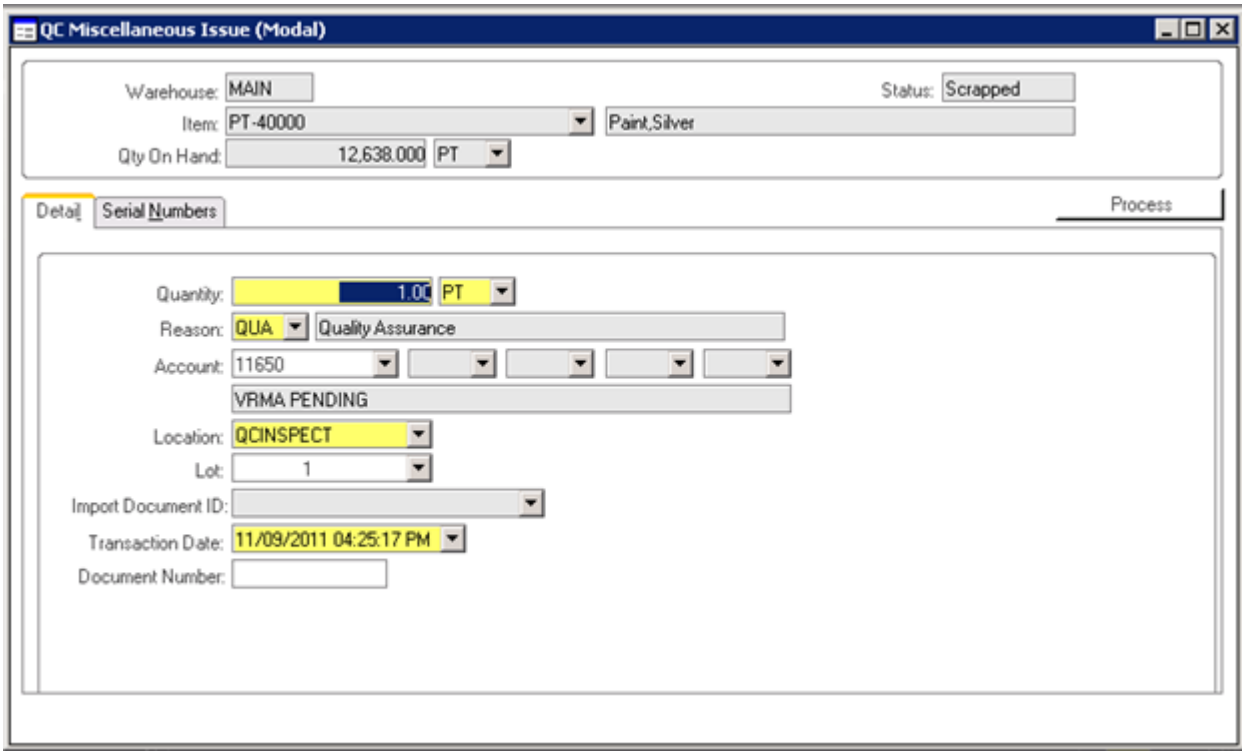
Starting/Ending Vendor

Starting/Ending VRMA

Print Options: Sort by VRMA Number, Vendor, or Item

Note Types: Print Internal Notes/ Print External Notes

QCS Vendor RMA Return (Ship) to Supplier



QC Vendor RMAs – Return Matl Button

DESCRIPTION: This form will remove your 'Returned' material from inventory. This form is only accessible from the Vendor RMA Maintenance Form – Return Matl button.

Field Descriptions:

Header

Displays the Vend RMAs Warehouse, Item and description, QC Status and Quantity on Hand for this Transaction

Detail Tab

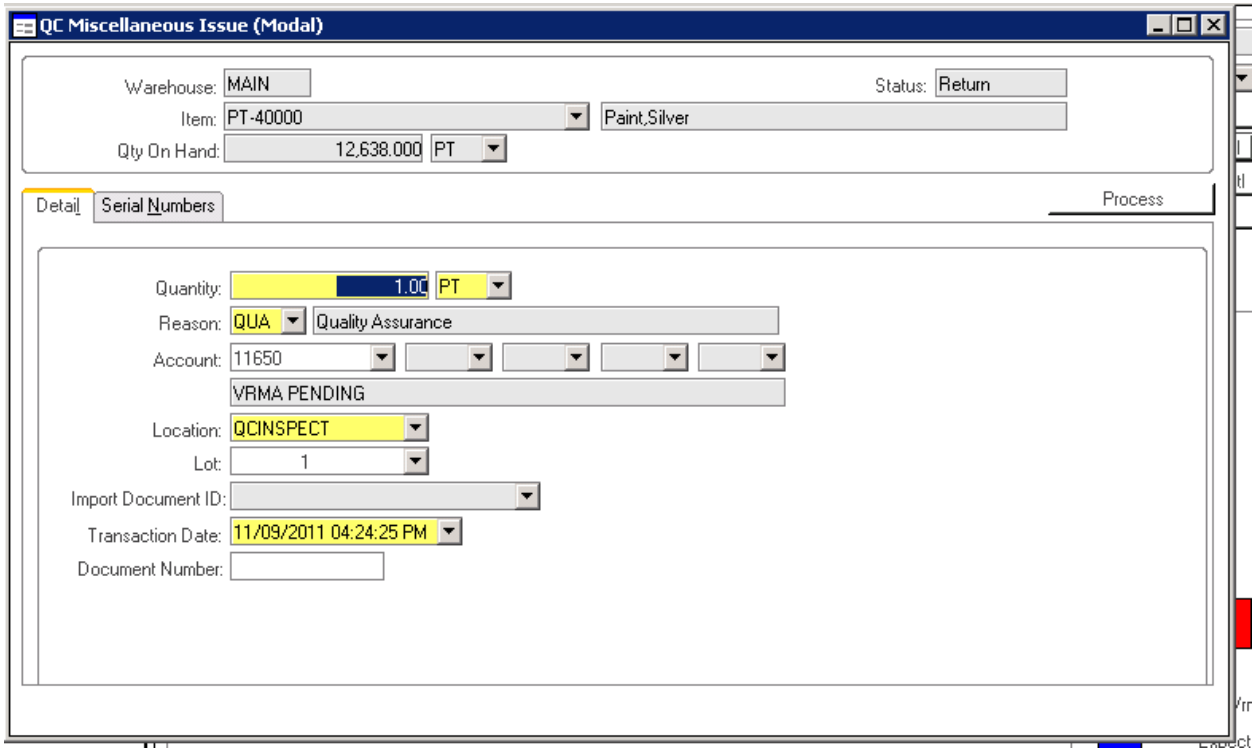
- Quantity: Defaults from the VRMA Qty and can be made lower than the default
- Reason: Defaults/Displays from the QC Supplier Parameters Material Issue Reason Code
- Account: Defaults/Displays from the QC Supplier Parameters VRMA Pending Account
- Location: Displays the QC Receiver's Location
- Lot: For a lot-tracked item, displays the QC Receiver's Lot

➢ Transaction Date: Defaults to the system date

Button:

➢ Process: Performs the Material Issue, prompts if you like the VRMA Packing Slip to print, returns to the QC Vendor RMAs form

QCS Vendor RMA Process Scrapped Material



QC Vendor RMAs – Scrap Matl Button

DESCRIPTION: This form will remove your 'Scrapped' material from inventory. This form is only accessible from the Vendor RMA Maintenance Form – Scrap Matl button.

Field Descriptions:
Header

Displays the Vend RMAs Warehouse, Item and description, QC Status and Quantity on Hand for this Transaction

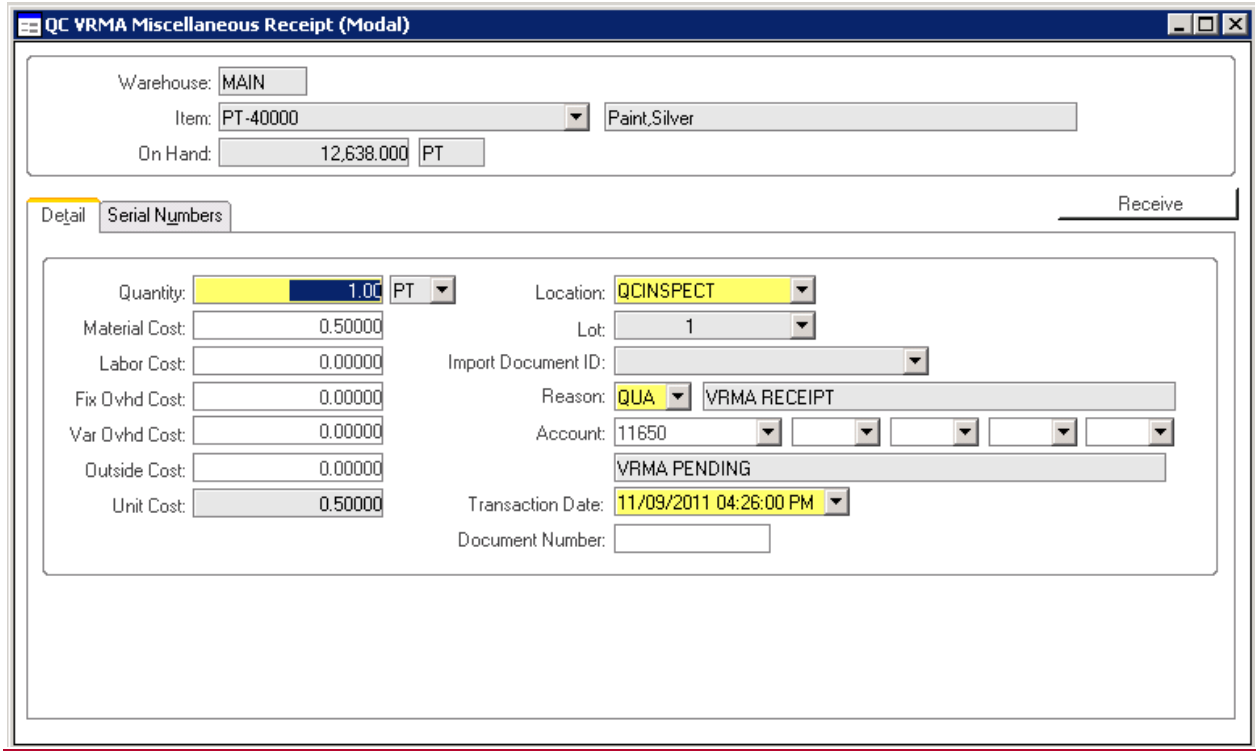
Detail Tab

- Quantity: Defaults from the VRMA Qty and can be made lower than the default
- Reason: Defaults/Displays from the QC Supplier Parameters Material Issue Reason Code
- Account: Defaults/Displays from the QC Supplier Parameters VRMA Pending Account
- Location: Displays the QC Receiver's Location
- Lot: For a lot-tracked item, displays the QC Receiver's Lot
- Transaction Date: Defaults to the system date

Button:

- Process: Perform the Material Issue and return to the QC Vendor RMAs form

QCS Vendor RMA Receive (Replacements)



QC Vendor RMAs – Receive Matl Button

DESCRIPTION: This function will record the receipt of material back from the supplier.

Field Descriptions:

Header

Displays the Vend RMAs Warehouse, Item and description, On Hand Qty and Unit of Measure

Detail Tab

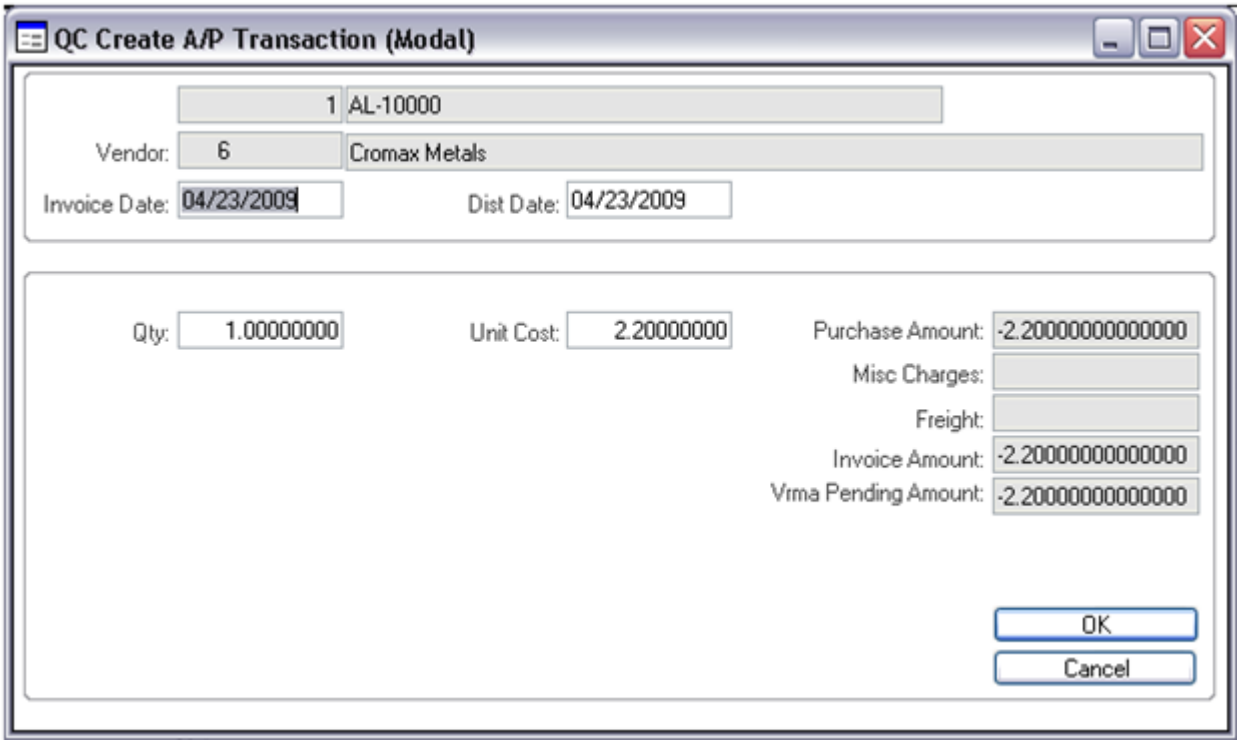
- Quantity: Defaults from the VRMA Qty and can be made lower than the default
- Material Cost: Default/Display from the original Purchase Order Line Price
- Fix Ovhd Cost: Enter the fixed overhead portion of the total cost of the displayed item
- Variable Overhead Cost: Enter the cost of the variable overhead to produce the displayed item. **NOTE: While you can update this field for an inventoried item, SyteLine ERP will ignore the update made on this form and use the appropriate costing for the item.**
- Outside Cost: Enter the outside services portion of the total cost for the displayed item

- Init Cost: The unit cost is a calculated value. It is the sum of the previous 5 costs.
- Location: Displays the QC Receiver's Location
- Lot: For a lot-tracked item, displays the QC Receiver's Lot
- Import Document ID: Enter or select the Import Document ID for the item (if tax-free) being reserved, ordered, or shipped
- Reason: Defaults/Displays from the QC Supplier Parameters Material Receipt Reason Code
- Account: Defaults/Displays from the QC Supplier Parameters VRMA Pending Account
- Transaction Date: Default/Display from the system date
- Document Number: Enter a value to track the movement of inventory on the Material Transaction Report. The document number is stored on the material transaction record for the transaction.

Button:

- Receive: Perform the Material Receipt and return to the QC Vendor RMAs form

QCS Vendor RMA Accounts Payable Linkage



QC Vendor RMAs – (Voucher) XRef button

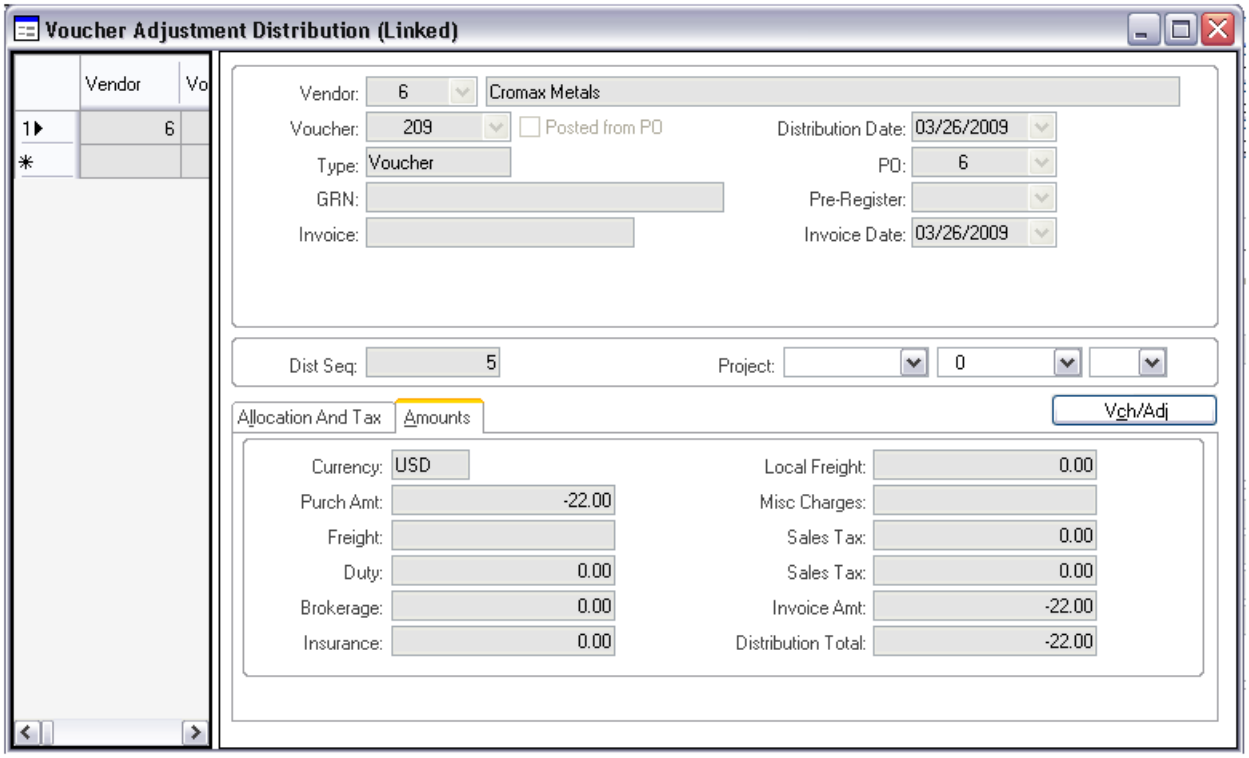
DESCRIPTION: Allows you to generate an A/P transactions for the current Vendor RMA.

Field Descriptions:

- Displays the VRMA Num, VRMA Item, Vendor and Name
- Invoice Date: Defaults to the system date
- Distribution Date: Defaults to the system date
- Qty: Defaults from the MRR/VRMA quantity expected
- Unit Cost: Defaults from the Purchase Order Line
- Purchase Amount: Multiplies the Qty by the Unit Cost, and stores/displays the value as a negative
- Misc Charges: not currently enabled
- Freight: not currently enabled
- Invoice Amount: Purchase Amount
- VRMA Pending Amount: Qty times the Purchase Order Line unit cost and stores/displays the value as a negative

Buttons:

- OK: A voucher is created for the A/P Account, with a distribution of the Purchase Amount against the VRMA Pending Amount. If the Purchase Amount is less than the VRMA Pending Amount, a second distribution is created using the VRMA Loss Account for the difference.
- Cancel: Form exits without processing



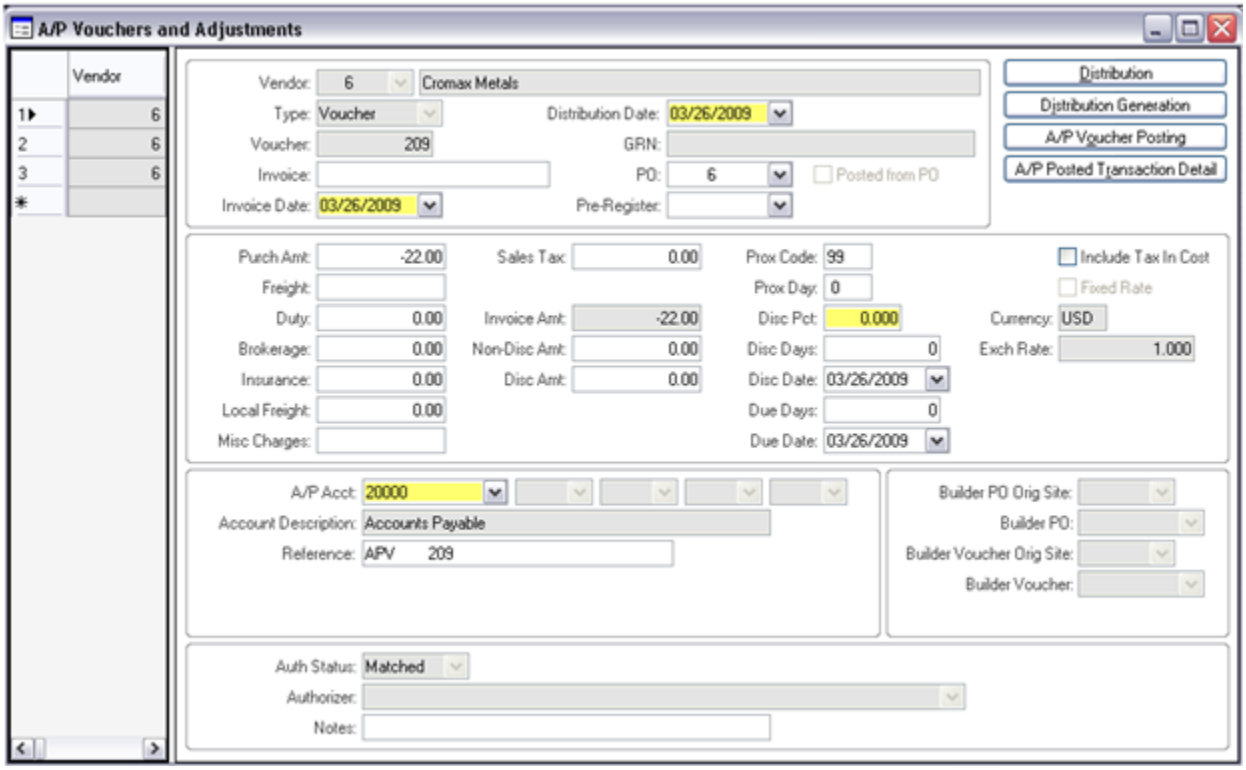
A/P Vouchers and Adjustments

This is a standard SyteLine Form that is launched from the Voucher button on the Reference Tab of the QC Vendor RMA Maintenance Form

Process:

1) Find the voucher
2) Verify Distribution date (defaults to date voucher was created)
3) Reference original PO
4) Invoice field (enter the credit memo ref # from the supplier)
5) <SAVE> the form
6) Select the [Distribution] button - *this step optional*

A/P Vouchers and Adjustments Distributions

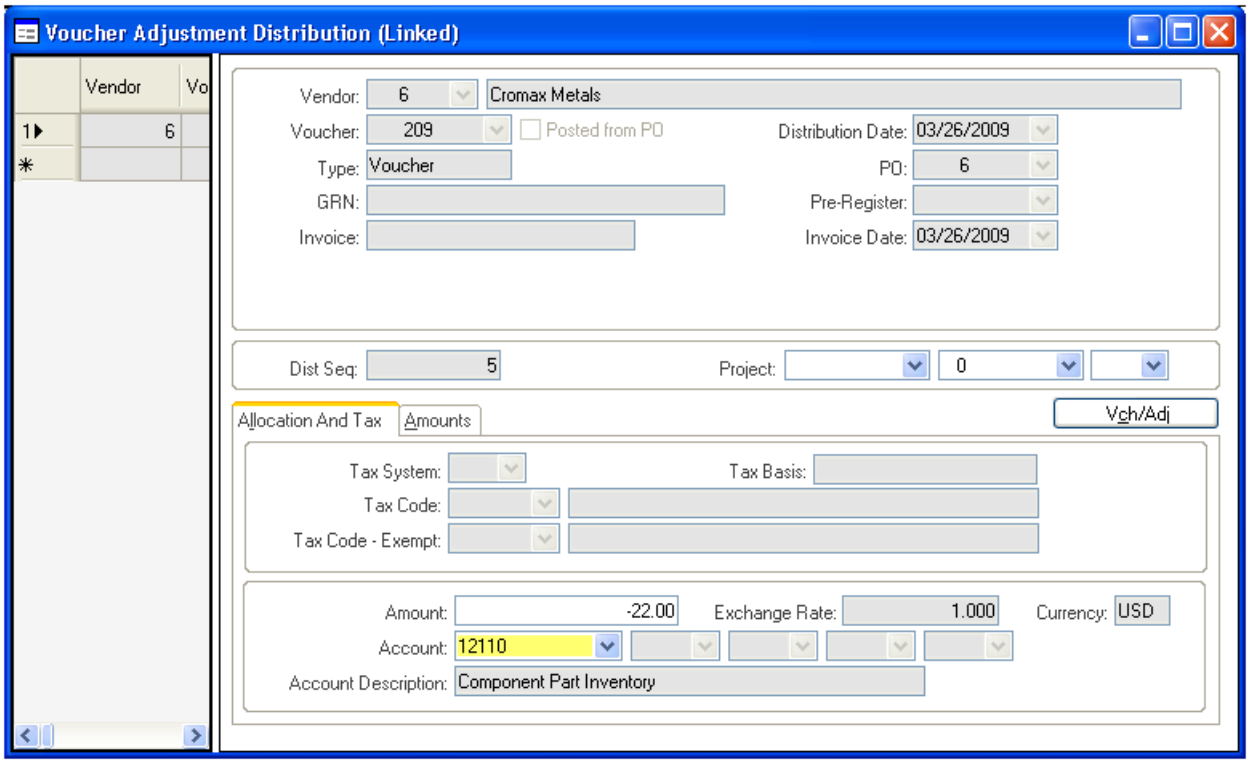


A/P Vouchers and Adjustments - Distribution Button

Process: ***(Optional)***

Verify: First entry shows cleared VRMA Pending account

A/P Vouchers and Adjustments Distributions



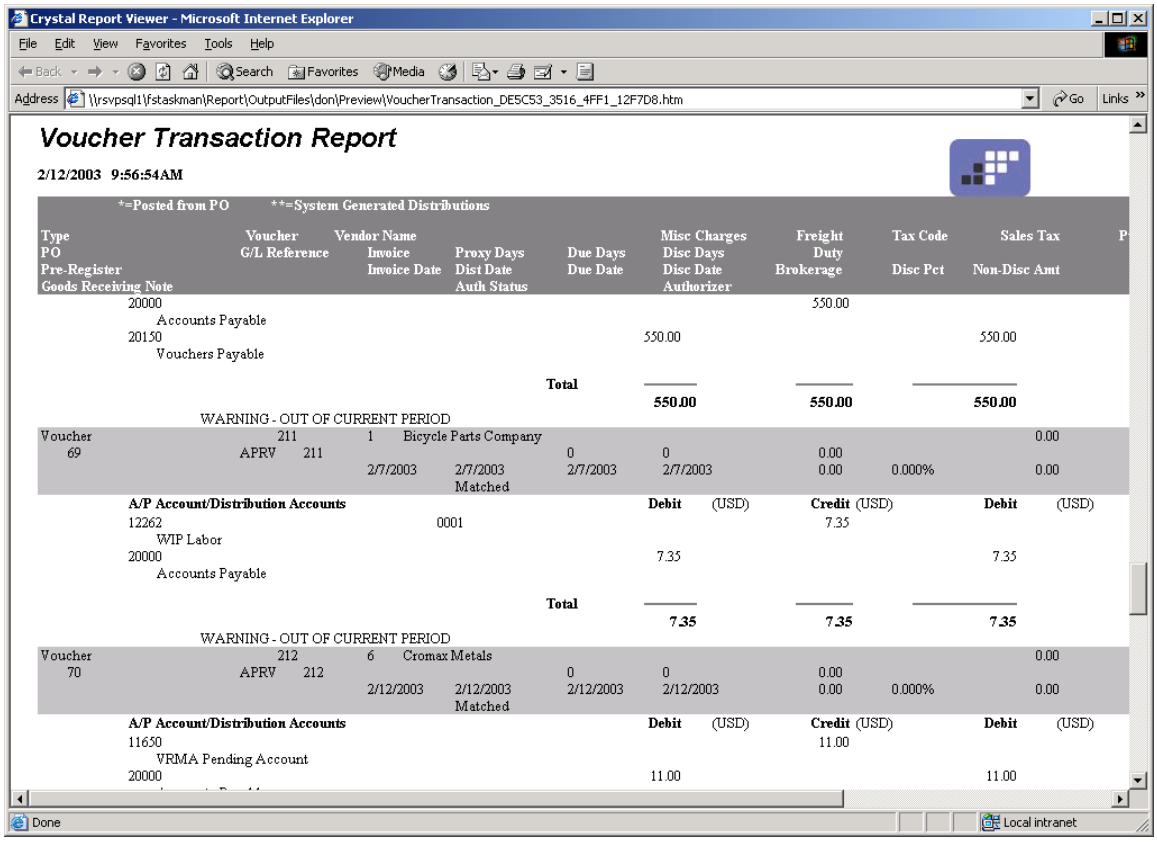
A/P Vouchers and Adjustments - Distribution Button

Process: ***(Optional)***

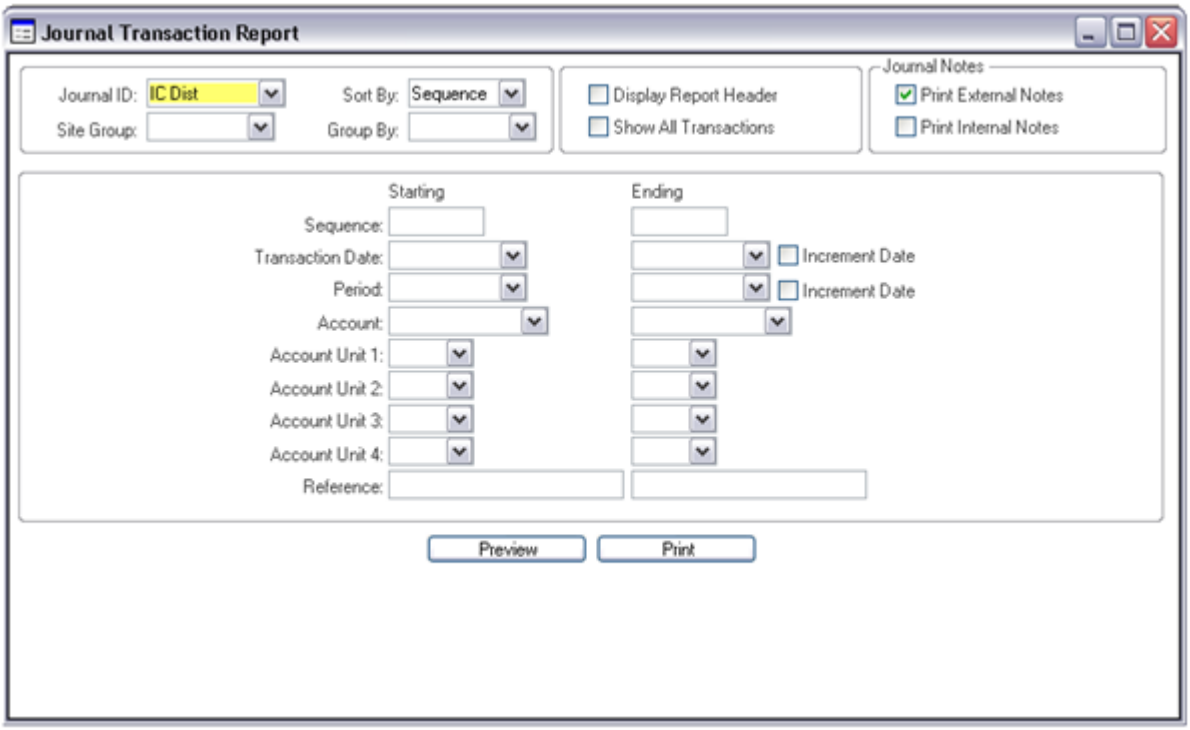
1) Verify second entry shows offset amount applied to VRMA Loss offset account

2) Post A/P Vouchers (Activities - A/P Voucher Posting)

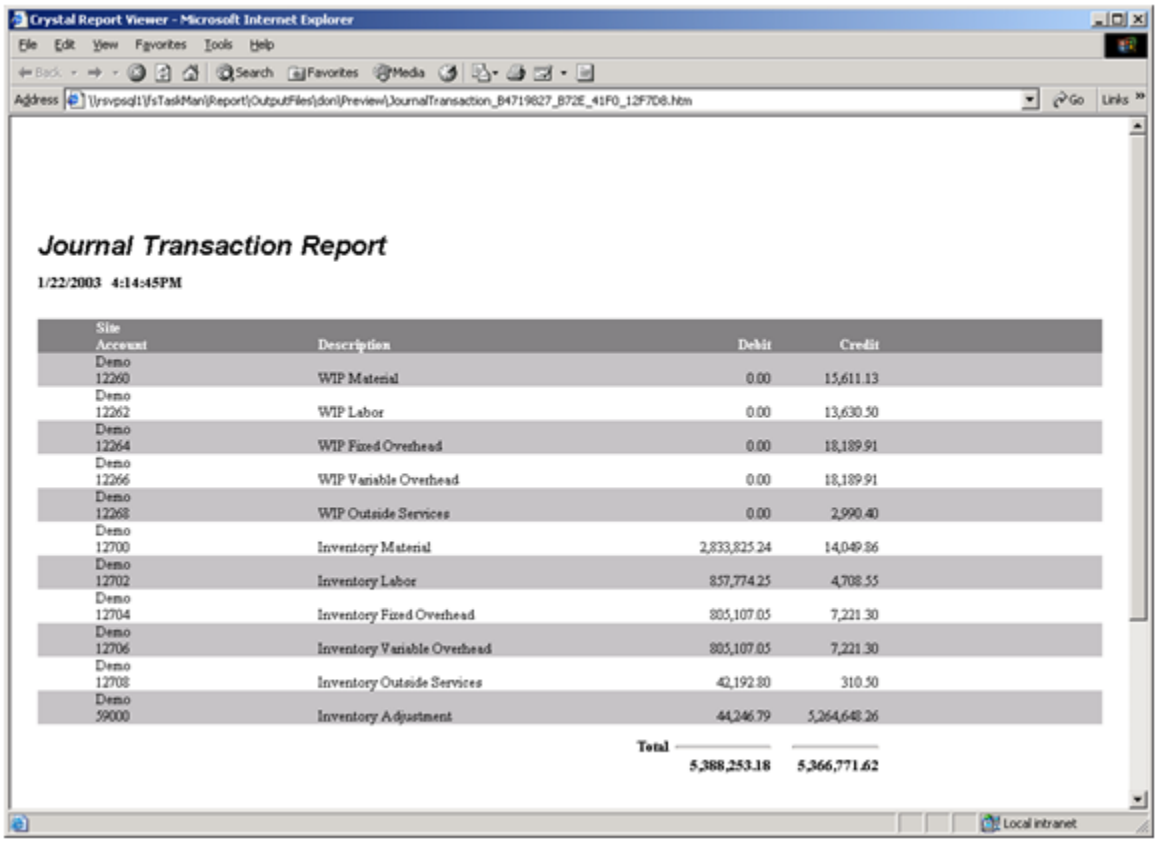
Voucher Transaction Posting Report



Journal Transaction Report



Journal Transaction Report



Site Account	Description	Debit	Credit
Demo 12260	WIP Material	0.00	15,611.13
Demo 12262	WIP Labor	0.00	13,630.50
Demo 12264	WIP Fixed Overhead	0.00	18,189.91
Demo 12266	WIP Variable Overhead	0.00	18,189.91
Demo 12268	WIP Outside Services	0.00	2,990.40
Demo 12700	Inventory Material	2,833,825.24	14,049.86
Demo 12702	Inventory Labor	857,774.25	4,708.55
Demo 12704	Inventory Fixed Overhead	805,107.05	7,221.30
Demo 12706	Inventory Variable Overhead	805,107.05	7,221.30
Demo 12708	Inventory Outside Services	42,192.80	310.50
Demo 59000	Inventory Adjustment	44,246.79	5,264,648.26
	Total	**5,388,253.18**	**5,366,771.62**

Shows Value of material on the VRMA going out of inventory and into VRMA Pending account

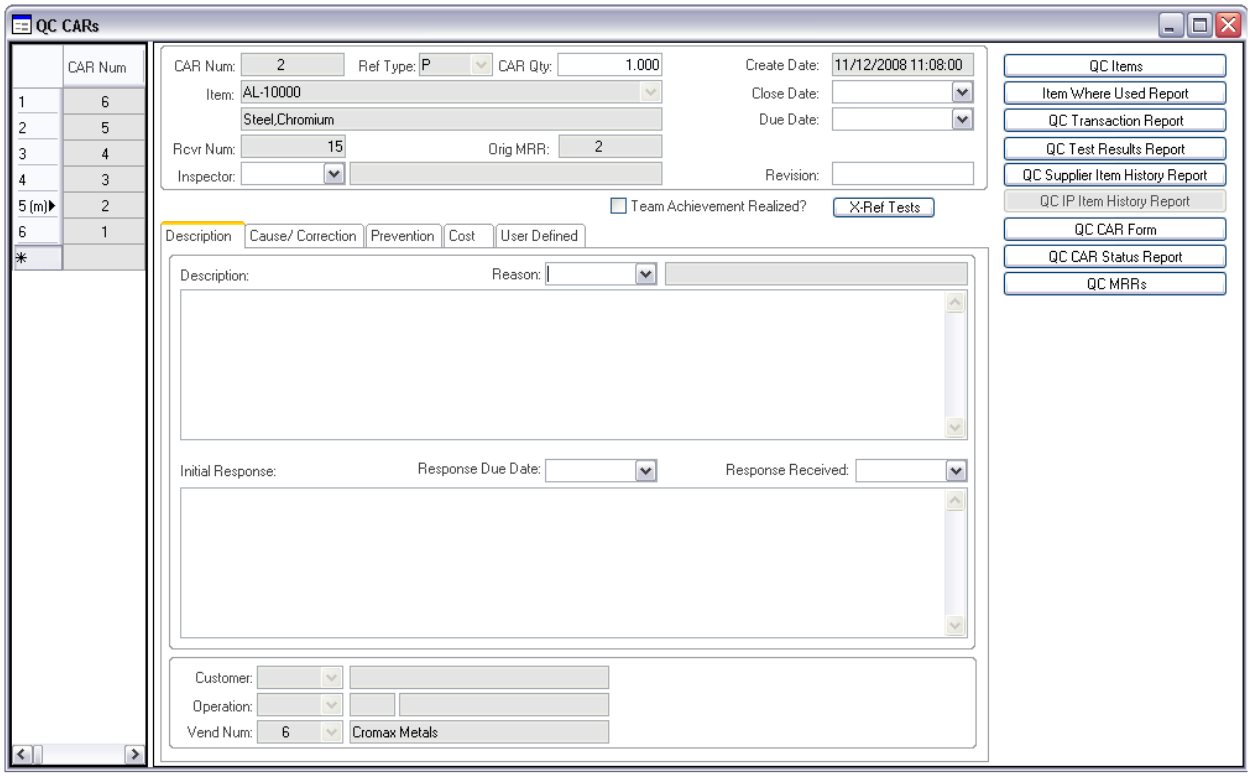
The Vendor RMA document can be closed only when all required activity has been posted. Specifically this includes the following:

1) Quantity on the Vendor RMA = the quantity Returned and/or Scrapped.
2) Quantity expected back from the supplier equals the quantity received back from the supplier.

Process:

1) Access the QC VRMAs form and select the VRMA
2) Mark the status Closed.

QC CARs



QC CARs

DESCRIPTION: Maintain CARs. A CAR can be created independent of QCS material activity.

Field Descriptions:
Header

- CAR Num: System generated next available number
- Ref Type: P, J, R, or O
- CAR Qty: User defined
- Create Date: Displays the system date when the CAR was created
- Item/Description: Displays CARs Item number and its SyteLine description
- Close Date: User defined date to show when the CAR was closed
- Rcvr Num: If CAR was created from an MRR, displays receiver number linked to that MRR

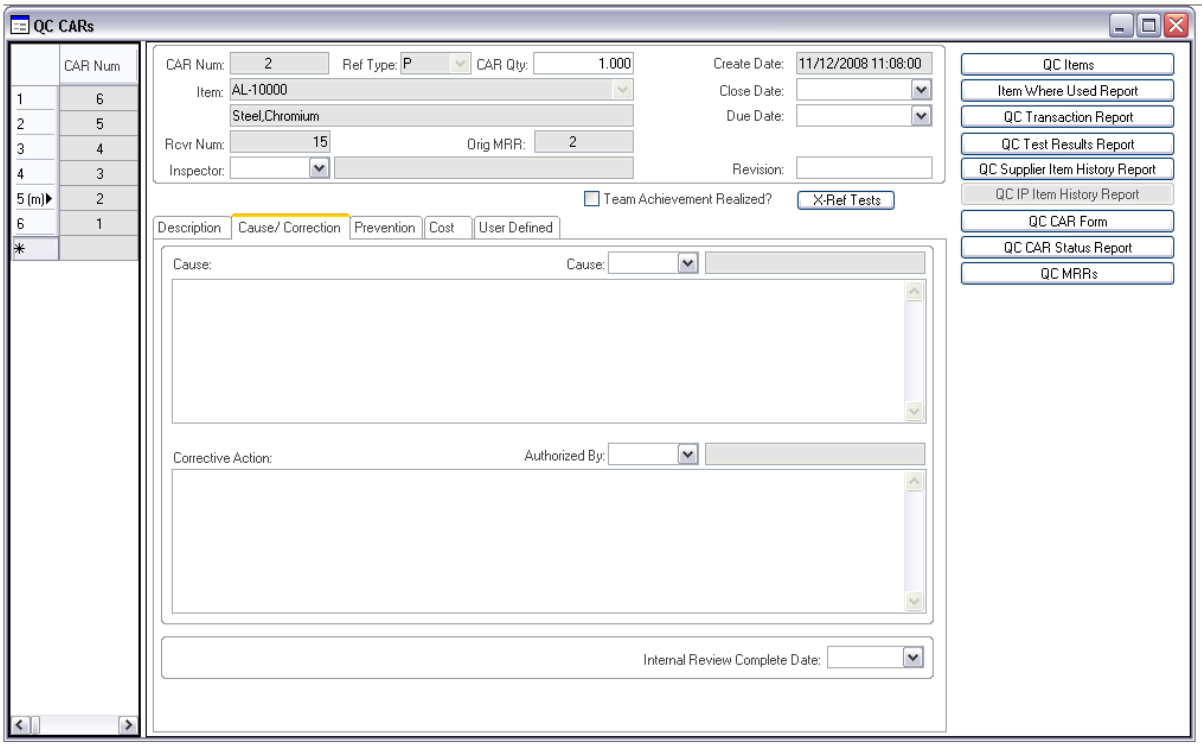
- Orig MRR: If CAR was created from an MRR, displays related MRR number
- Internal Review Complete Date: User defined date field
- Inspector: User defined, validated against the SyteLine employee table. Name will display
- Team Achievement Realized?: User defined

Buttons:

- MRRs: Jump to MRR form for linked MRR
- X-Ref Tests: Assign test results (if a receiver is linked) to the CAR (works identical to Xref Test Results to an MRR description - see page *149*)

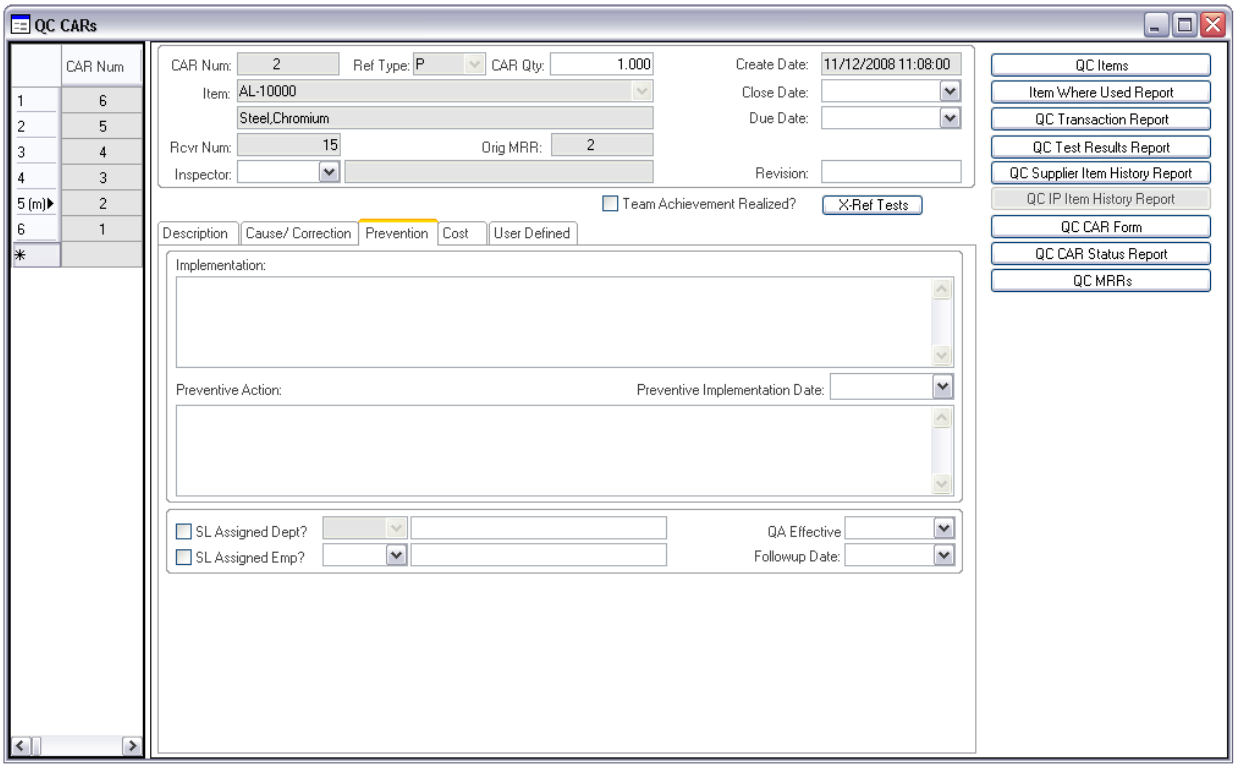
Description Tab

- Reason: Select a reason code validated from the QC Reason Codes Table
- Problem Description: User defined (400 characters)
- Response Due Date: User defined
- Response Received: User defined
- Initial Response: User defined (400 characters)
- Customer/Operation/Vendor: Displays information from Receiver, if applicable



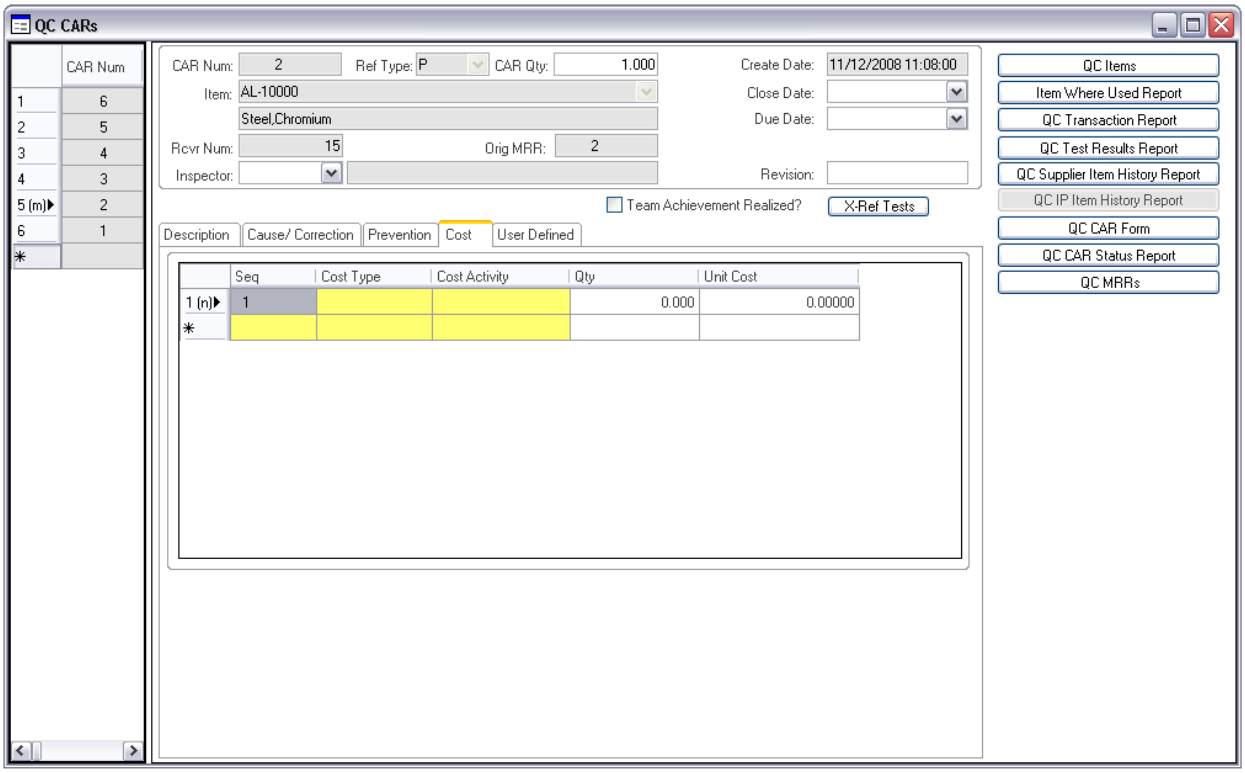
Cause/Correction Tab

- Cause: Select cause validated from QC Cause Codes table
- Cause of Defect: User defined (400 characters)
- Corrective Action: User defined (400 characters)
- Authorized By: If entered, validated again SyteLine employee table



Prevention Tab

- Implementation: User defined
- Preventive Implementation Date: User defined
- Preventive Action: User defined
- SL Assigned Dept?: If you wish to designate a SyteLine department for the CAR, check this box, enter the department ID in the next box (and its description will display); if not checked, a freeform entry can be entered in the dept description.
- SL Assigned Emp?: If you wish to designate a SyteLine employee for the CAR, check this box, enter the employee number in the next box (and the person's name will display); if not checked, a freeform entry can be entered in the employee name.
- QA Effective: User defined
- Follow up Date: User defined



Costs Tab

- Seq: System-generated
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Cost Activity: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece

Notes:

1) **Once a CAR is created it cannot be deleted.**
2) **An entry in 'Close Date' and 'Authorized By' closes a CAR. The CAR can be re-opened by removing the values from these fields.**
3) **CAR costs are not linked with SyteLine financials.**

QC Supplier Reports

- **Supplier Ready for Receiving Inspection**: Lists material available for inspection

- ***Supplier Item Detail/Worksheet:*** A paper version of the 'Record Test Results' form. Can be used for entering test data before entering into QCS

- **Supplier Item History:** Shows QCS item activity by vendor and receiver number

- **Supplier Value of Inventory:** A list of undispositioned QCS items in PO number order. The calculation takes the PO unit cost for each item times the quantity of the item in the QCS location. Shows the value of undispositioned items in QC, dispositioned items may still be in the QC stockroom location, depending on how inventory move transactions are handled

- **Supplier Vendor Performance:** Calculates a rank for the vendor based on Delivery and Quality history, and points set in the QC Vendor Rating and QC Disposition forms. Delivery points are based on a calculation of the PO due date or promise date vs date received into QC against the delivery points established in the ranking table. See QC Vendor Rating, Quality points are based on the quantity of pieces dispositioned and the quality points for the associated disposition code

- **Supplier Vendor Status:** A listing of QCS vendor information

- **Supplier Vendor PPM Report**: Displays a calculated value based on objective weightings entered into QC vendor parameters

- **Supplier VRMA Form:** A printable document that has related receiver, MRR, and VRMA information

- **Supplier VRMA Status:** Summary listing of VRMA records

- **Defect Distribution:** This report lists the user defined failure codes and quantities that were entered against receivers

- **Test Results:** A list of test results that were entered against receivers. Can be displayed for Summary or Individual test data

- **QC Item Report:** Listing of tests, inspection criteria and notes for an item

- **QC Transaction Report:** A listing of QCS transactions

- **MRR Form:** A printable document that has related receiver and MRR information

- **MRR Status Report**: Summary listing of Material Review Reports

- **CAR Form:** A printable document that has Corrective Action information

- **CAR Status Report:** Summary listing of Corrective Action Requests

- **QC SPC Report:** This report calculates the Mean, Standard Deviation, C_p and C_{pk} for the last designated number of completed tests for an item

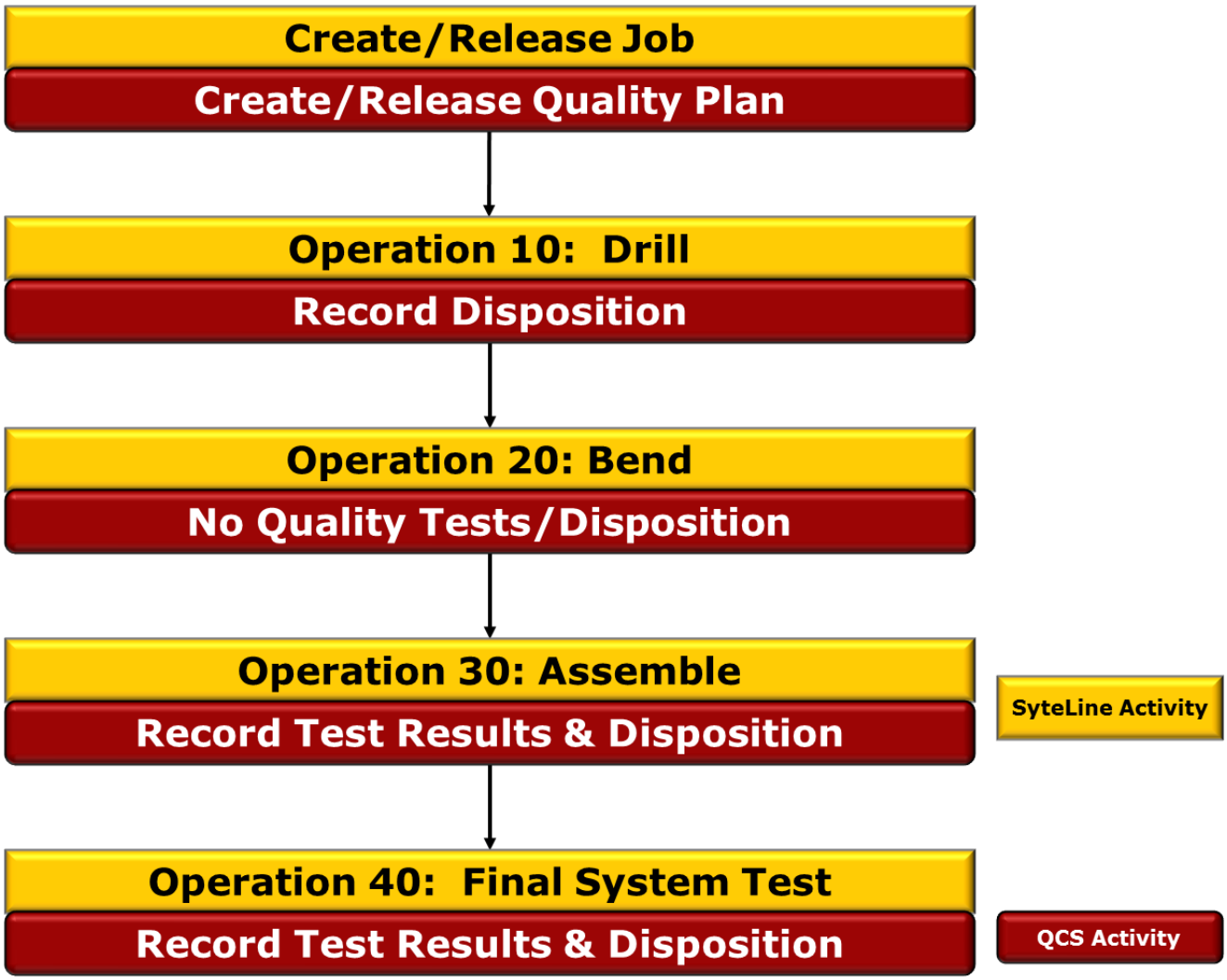
QCS In Process Section

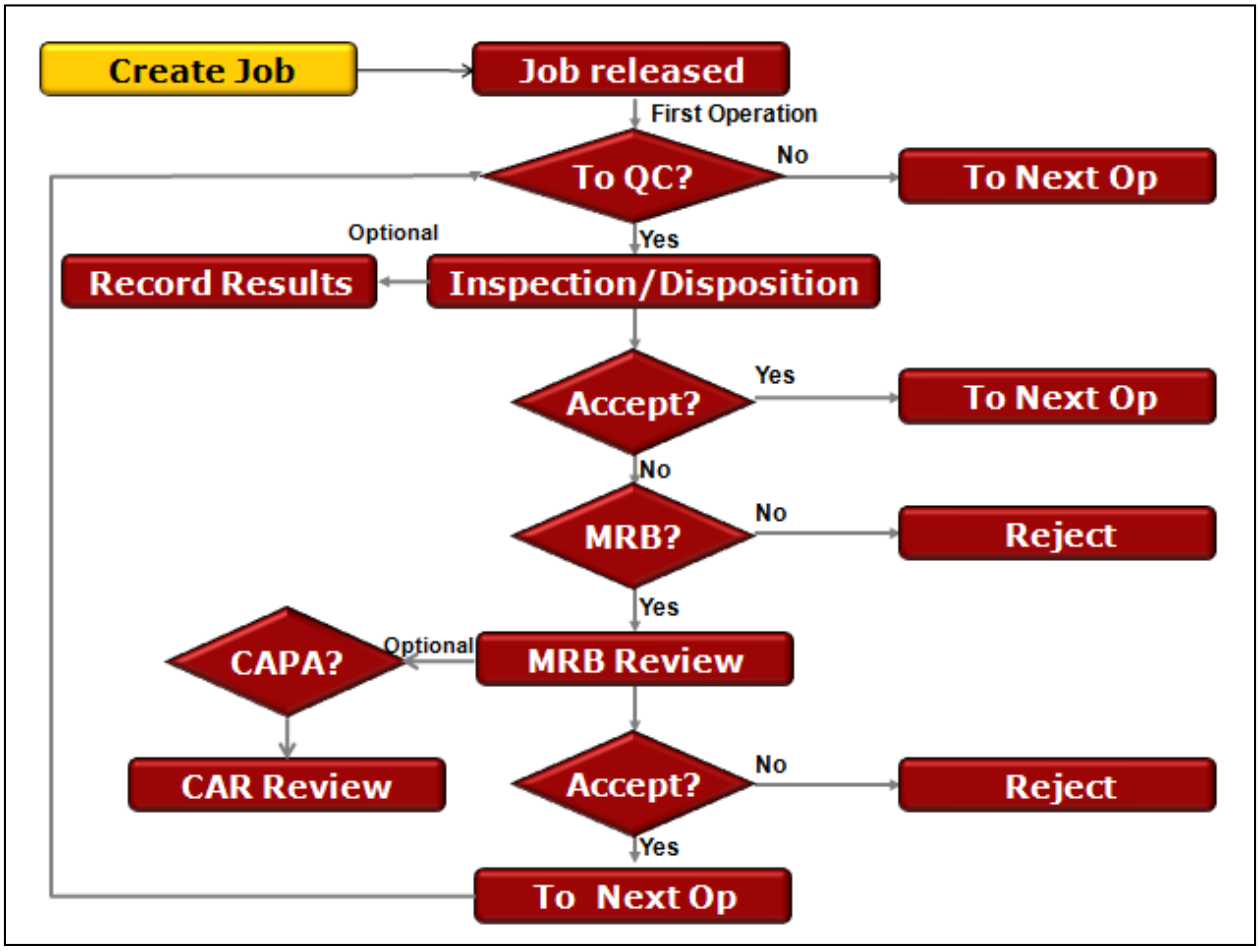
QCS In Process Overview

The Quality Control Solution (QCS) In Process (IP) module allows SyteLine users to track Quality information associated with SyteLine jobs and production schedules. The Quality Department defines a Quality Plan to track the Job from its initial release through its completion. The Quality Plan defines the related checkpoints needed to ensure that the process and product perform correctly. It is a companion to the Job Production Plan (a.k.a. the Job BOM/Routing).

QCS IP also tracks non-conforming products, i.e. those items that failed and need to be reworked, scrapped, etc.; and provides tools to track and report Cost of Quality, MRRs, and CARs.

This manual describes the activities needed to run the QCS IP software. The setup of QC Solution, as defined in the QCS Setup section of this manual, must be completed prior to executing any procedures listed here.


Create/Release Job
Create/Release Quality Plan
Operation 10: Drill
Record Disposition
Operation 20: Bend
No Quality Tests/Disposition
Operation 30: Assemble
Record Test Results & Disposition
SyteLine Activity
Operation 40: Final System Test
Record Test Results & Disposition
QCS Activity

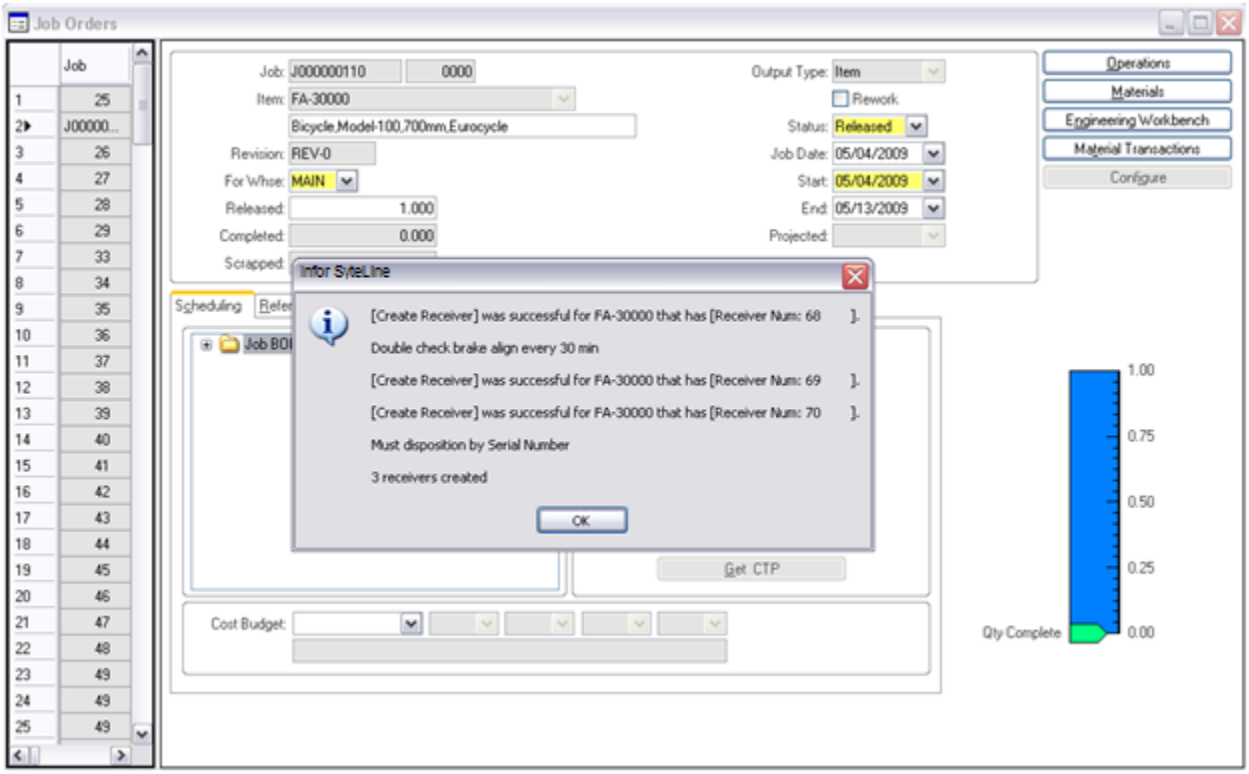


IMPORTANT NOTE:

When a job is created in standard SyteLine, the Current Routing/BOM must be copied to the job before it can be released. Depending on which method is used for the copy, the operations may be re-sequenced and will not match the operation # listed in the QCS item master set-up. If using the Copy Routing/BOM function, do *not* choose Option "Insert Range", as this will re-sequence the operations. If the job status is manually changed from 'Firm' to 'Released', a prompt will appear "Copy Current Routing/BOM will be performed". Ensure that 'Insert Range' is not the default in the SyteLine Copy Routing BOM activity.

- **Set up QC IP parameters to automatically create In Process Test Plans (please see the QCS Setup Section of this manual)**
- **After creating a job for a QC IP Item, change its status to 'Released'**
    - **Creates BOM for job (if not previously performed – please see note (above)**
    - **Creates one or more receivers to track this item's IP Quality Plan through QCS**

Using this method, a receiver is created in the Job Orders form, when an IP QCS Job's status is changed to 'Released'. Sub-jobs are not passed through the QCS Process, only the top-level job being accessed.

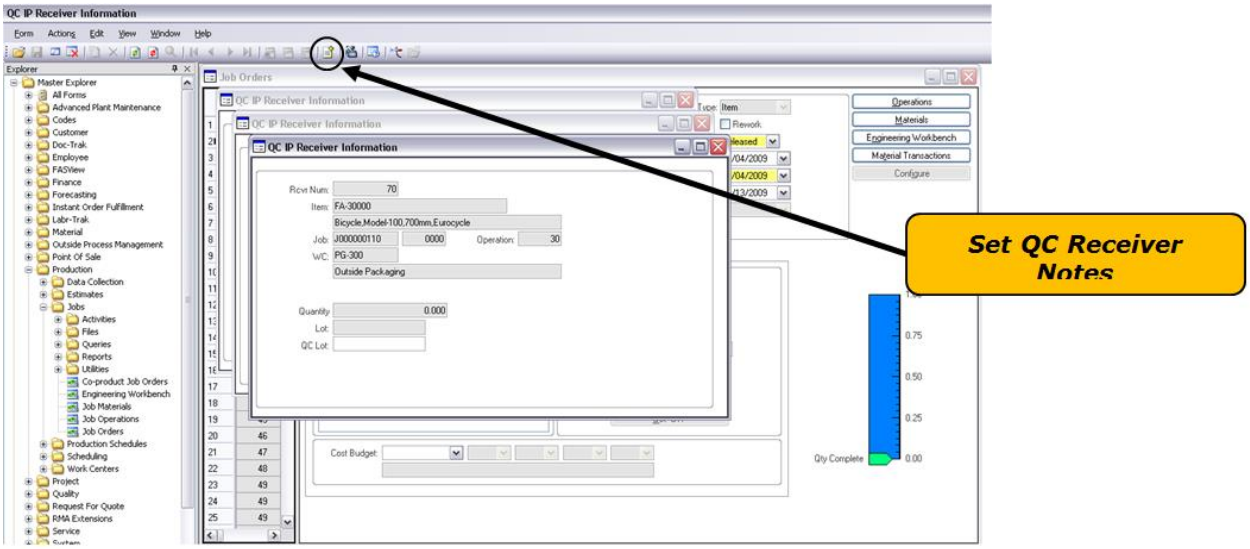


Process Steps:

- Create Job and copy BOM/Routing to the Job
- Change Job Status from 'Firm' to 'Released'
    - If your QC IP Parameter (Auto Create In Process Test Plans) is checked, and this Job is for a QCS IP Item, create a receiver for each Operation/Test Sequence you will receive a

notification of receivers created, along with any other information based on the parameter and item settings

- Based on QC IP Parameter, if you have chosen to print tags, one will print for each receiver created (Default for QC IP Inspection Tags)
- Based on QC IP Parameter, if you have chosen to see the QC Information form, it will pop up for each receiver created. From here you can update the QC LOT and/or add notes to this receiver (Display QC Window when creating Receiver)

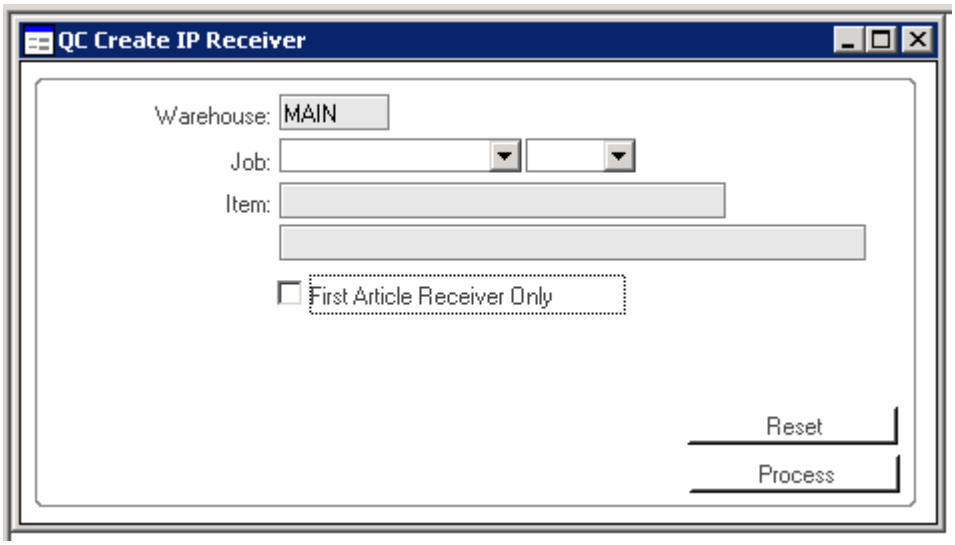


DESCRIPTION: Receiver notes and a QC Lot number can be set when a Receiver is created.

Note:

1) **The standard notes icon in the toolbar is available for users to add QC receiver notes.**

- **This method can be used in place of the creation of receivers from status change in 'Job Orders', or as an option for moving parts into QCS outside of the standard Job process flow.**



Receivers can only be created for Jobs with status = 'Released', for a QCS IP Item. Only one set of receivers is allowed per Job/Suffix – if the receivers already exist, new ones will not be created. Sub-jobs are not passed through the QCS Process, only the top-level job being accessed.

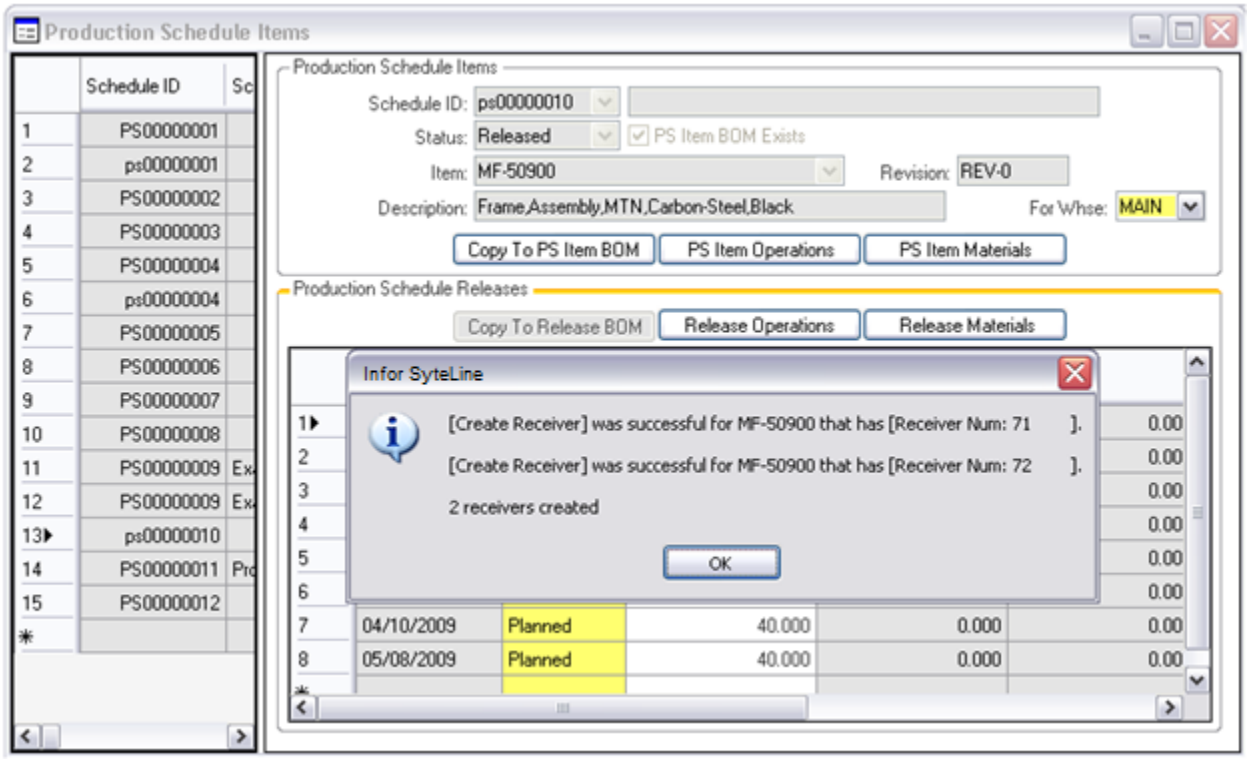
Process Steps:

- Create Job and copy BOM/Routing to the Job
- Change Job Status from 'Firm' to 'Released'
- Access QC Create IP Receiver for job/suffix
    - Based on QC IP Parameter, if you have chosen to print tags, one will print for each receiver created. (Default for QC IP Inspection Tags)

- Based on QC IP Parameter, if you have chosen to see the QC Information form, it will pop up for each receiver created. From here, you can update the QC LOT and/or add notes to this receiver (Display QC Window when creating Receiver)
- If you are after a First Article receiver only, then check the First Article receiver Only box, otherwise a standard receiver will be created.

Create IP PS Receiver(s)/Quality Plan – Production Schedule Items

- **Set up QC IP parameters to automatically create In Process Test Plans (please see the QCS Setup Section of this manual)**
- **After creating a production schedule and one or more items for a QC IP Item, change a Production Schedule Item's status to 'Released'**
  - **Creates one or more receivers to track this item's IP Quality Plan through QCS**

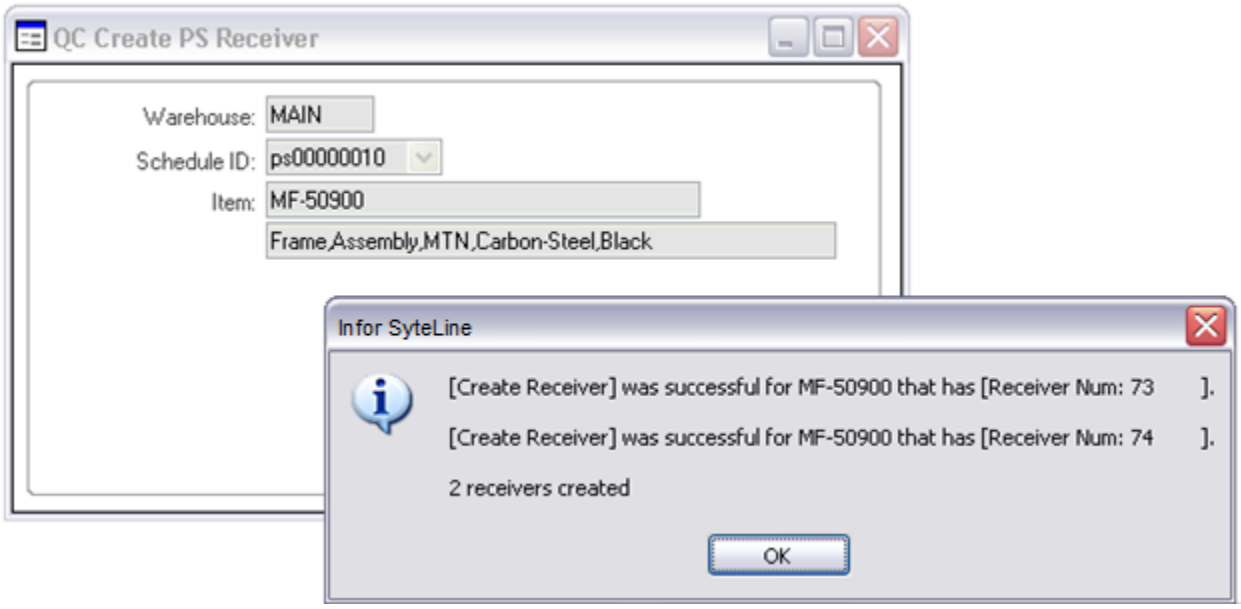


Using this method, a receiver is created in the Production Schedule Items form, when an IP QCS PS Item's status is changed to 'Released'.

Process Steps:

- Create Production Schedule and Item(s)
- Change PS Item's Status from 'Firm' to 'Released'
    - If your QC IP Parameter (Auto Create In Process Test Plans) is checked, and this Production Schedule is for a QCS IP Item, create a receiver for each Operation/Test Sequence you will receive a notification of receivers created, along with any other information based on the parameter and item settings
    - Based on QC IP Parameter, if you have chosen to print tags, one will print for each receiver created (Default for QC IP Inspection Tags)
    - Based on QC IP Parameter, if you have chosen to see the QC Information form, it will pop up for each receiver created. From here you can update the QC LOT and/or add notes to this receiver (Display QC Window when creating Receiver)

- This method can be used in place of the creation of receivers from status change in 'Production Schedule Items', or as an option for moving parts into QCS outside of the standard Production Schedule process flow.



Production Schedules: Manual Test Plan Creation

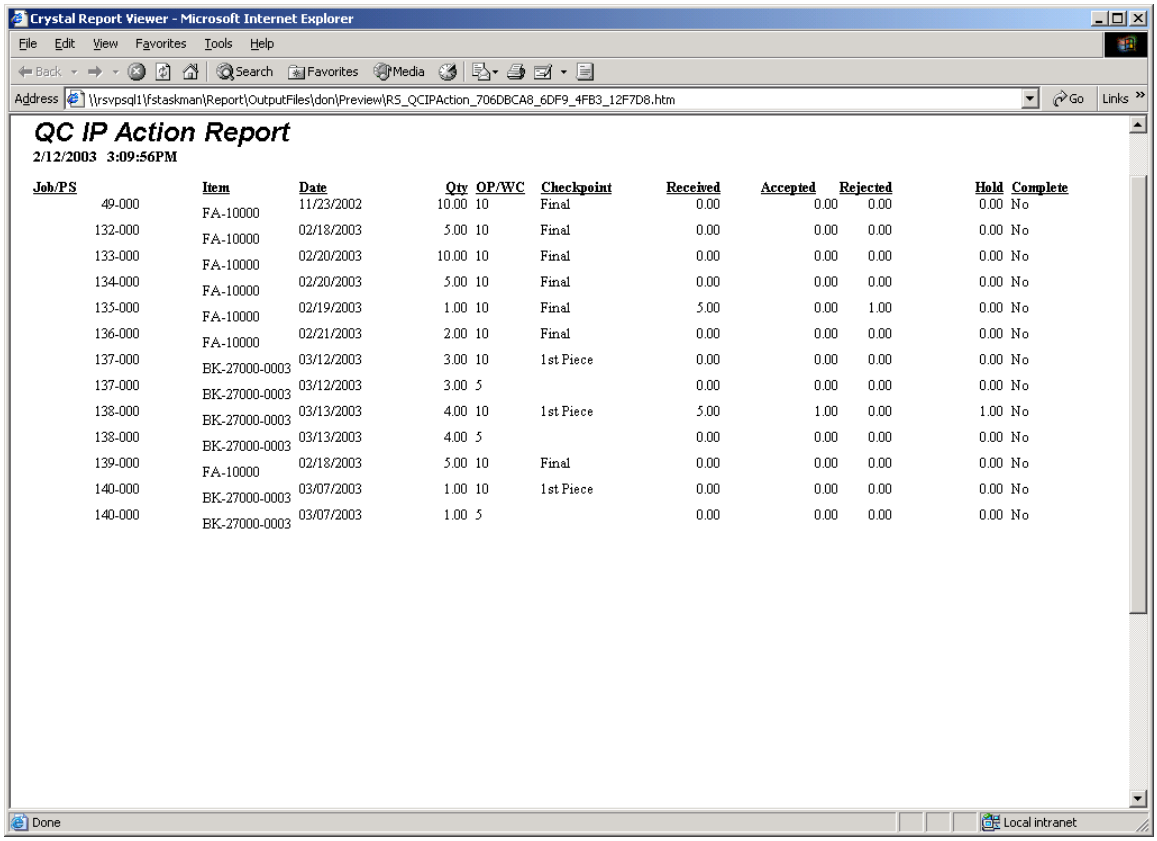
- Create Production Schedule with releases for an item
- Change Release Status from 'Firm' to 'Released'
- Manually create Quality Plan for PS release

Identifying Quality Plans Waiting for Disposition

There are several methods you can use to check on the work waiting in the QCS queue. Any one or a combination of these methods can help you schedule activity in the Quality Assurance area.

- Preview/Print the QC IP Action Report
- Access the QC IP Job (or PS) Inspect/Disposition form
- Access the QC IP Job (or PS) Inspect/Disposition Query form

IP Action Report

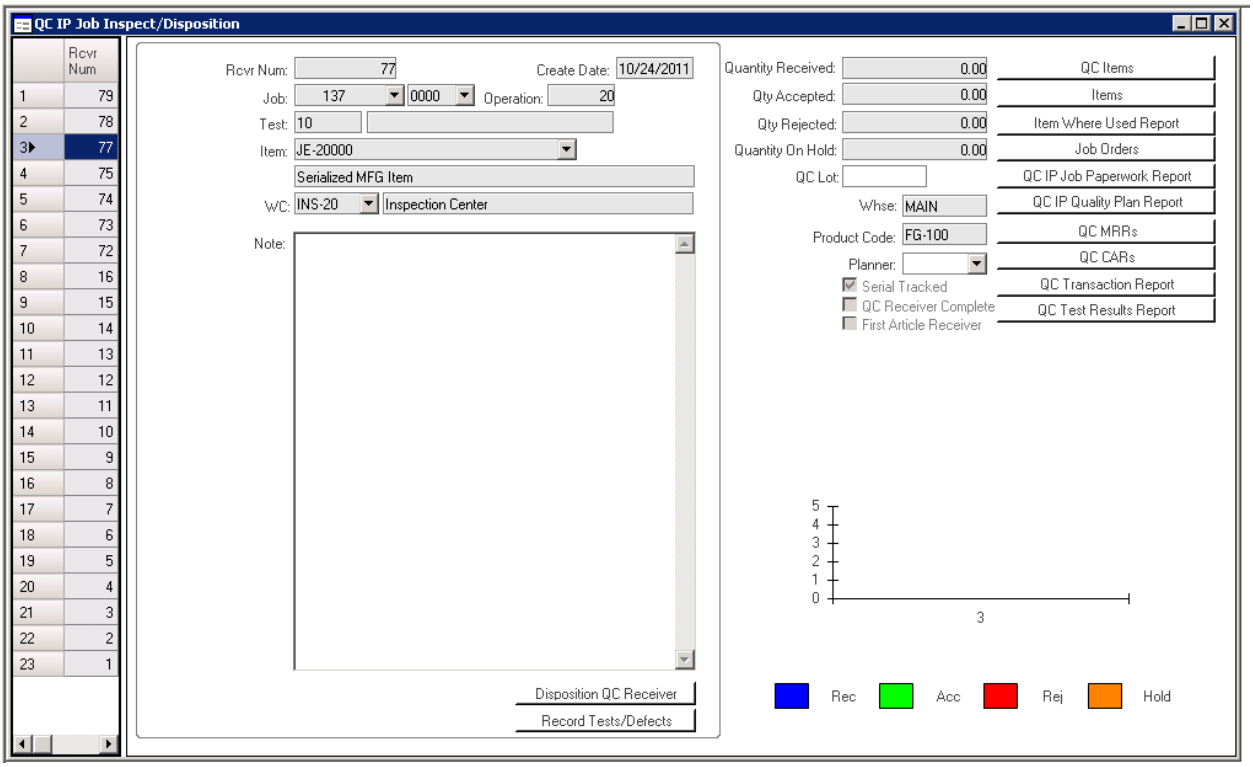


Job/PS	Item	Date	Qty	OP/WC	Checkpoint	Received	Accepted	Rejected	Hold	Complete
49-000	FA-10000	11/23/2002	10.00	10	Final	0.00	0.00	0.00	0.00	No
132-000	FA-10000	02/18/2003	5.00	10	Final	0.00	0.00	0.00	0.00	No
133-000	FA-10000	02/20/2003	10.00	10	Final	0.00	0.00	0.00	0.00	No
134-000	FA-10000	02/20/2003	5.00	10	Final	0.00	0.00	0.00	0.00	No
135-000	FA-10000	02/19/2003	1.00	10	Final	5.00	0.00	1.00	0.00	No
136-000	FA-10000	02/21/2003	2.00	10	Final	0.00	0.00	0.00	0.00	No
137-000	BK-27000-0003	03/12/2003	3.00	10	1st Piece	0.00	0.00	0.00	0.00	No
137-000	BK-27000-0003	03/12/2003	3.00	5		0.00	0.00	0.00	0.00	No
138-000	BK-27000-0003	03/13/2003	4.00	10	1st Piece	5.00	1.00	0.00	1.00	No
138-000	BK-27000-0003	03/13/2003	4.00	5		0.00	0.00	0.00	0.00	No
139-000	FA-10000	02/18/2003	5.00	10	Final	0.00	0.00	0.00	0.00	No
140-000	BK-27000-0003	03/07/2003	1.00	10	1st Piece	0.00	0.00	0.00	0.00	No
140-000	BK-27000-0003	03/07/2003	1.00	5		0.00	0.00	0.00	0.00	No

QC IP Action Report

DESCRIPTION: Provides a listing of the jobs that need to be dispositioned by the Quality Department; i.e. this is a listing of material received into QCS that has not yet been fully dispositioned.

Inspect/Disposition Lookup



QC IP Job Inspect/Disposition

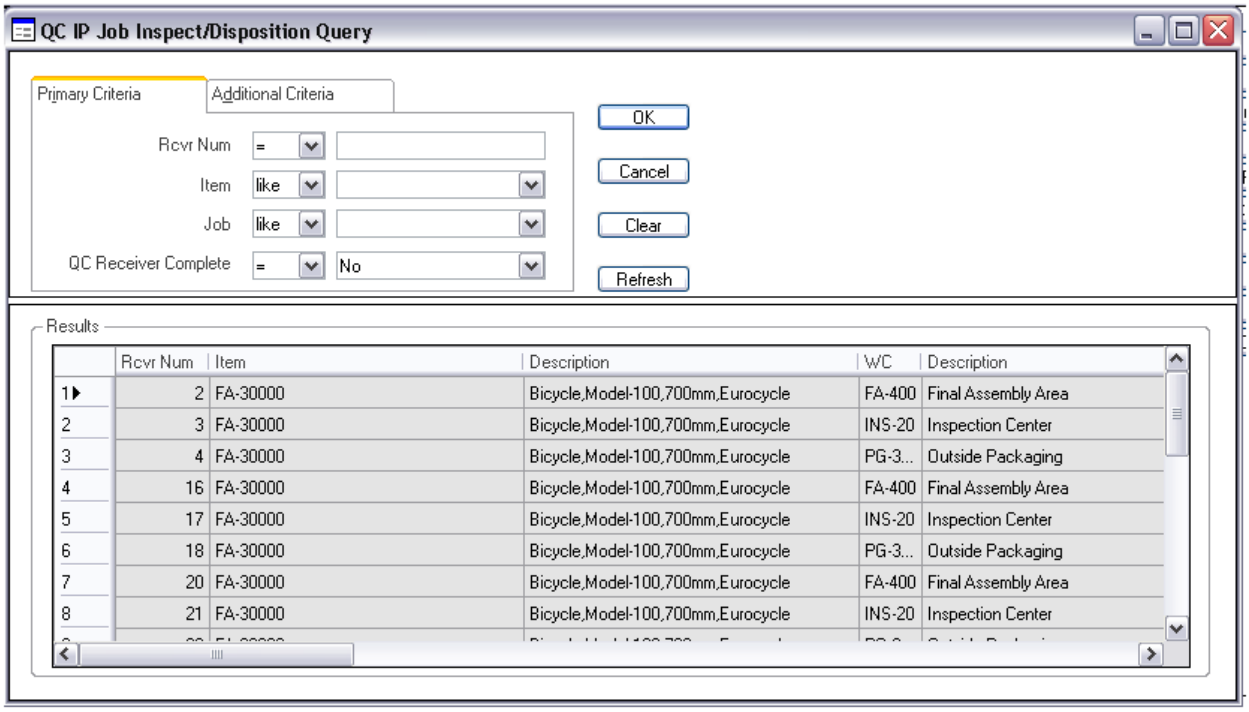
DESCRIPTION: This form is used to select a receiver to disposition and/or to record test results against that receiver.

- As with any SyteLine form, the number of receivers that show is based on your 'maximum retrieval' setting.
- By default, the receivers will display in reverse order by receiver number.
- By default, all receivers will be displayed
- The form will open in 'Filter' mode – you may fine-tune your query by any of the available fields to get a specific picture of the work in (or already completed from) the Quality department.

Note:

The QC IP PS Inspect/Disposition form can also be reviewed.

Inspection/Disposition Query Lookup



QC Job Inspect/Disposition Query

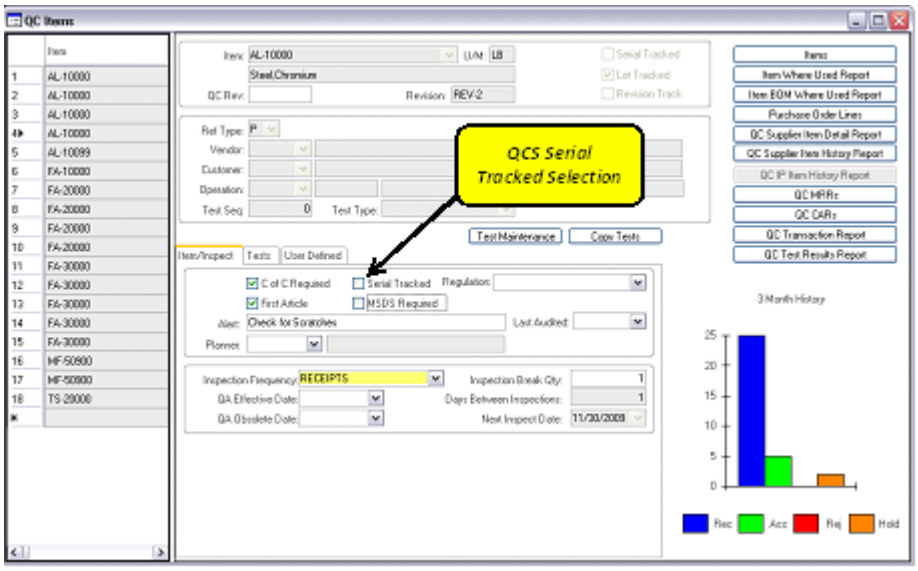
DESCRIPTION: This form allows the user to define a query for QCS IP Job Receivers. When configured as shown, the query displays all open IP Receivers. Use standard SyteLine query functionality to fine-tune your query.

Note:

The QC PS Inspect/Disposition Query form can also be reviewed.

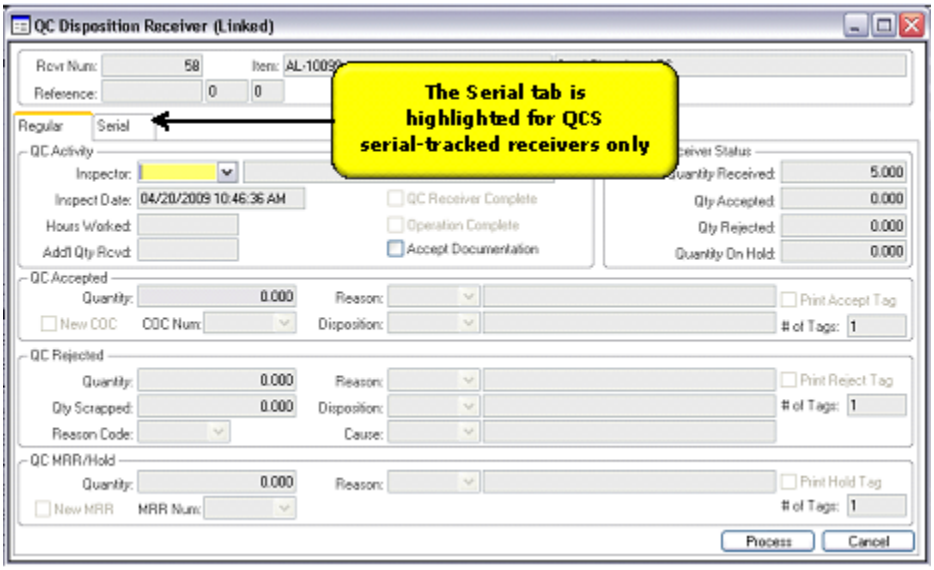
The QCS product allows you to track serial numbers that are internal to QCS only (e.g. not SyteLine serial numbers). This allows test results and dispositioning information to be stored by a specific item/serial number – but without the need to track serial numbers for this item throughout SyteLine.

An item can be set up for QCS Serial tracking using the QC Items form:



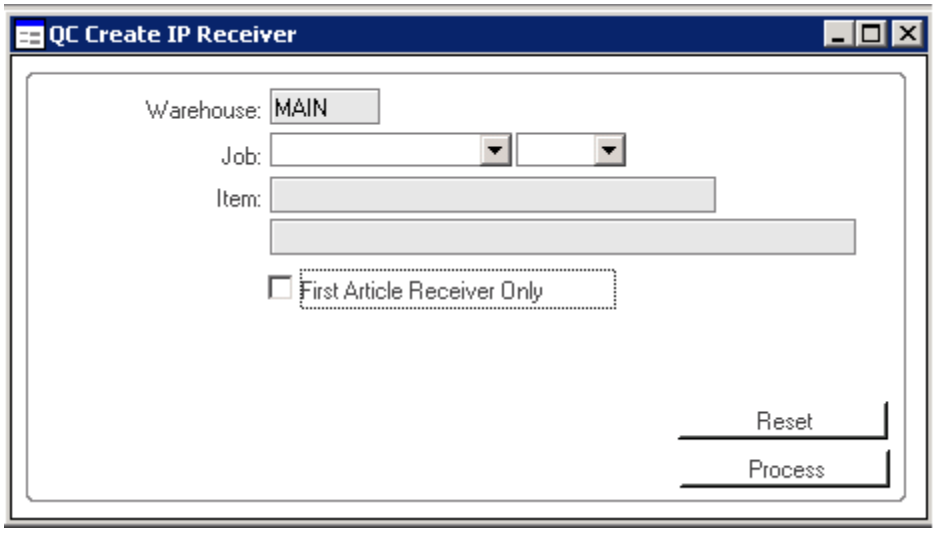
Once a QCS item is set up with the 'Serial Tracked' field selected, any receivers created from that point on will require that QCS Serial Numbers be created to record disposition or test results. Please note that QCS serial numbers are not associated with SL serial numbers.

Below is a sample of the QC Disposition Receiver form, as it will look for a receiver that is marked for QCS Serial Tracking:



The user will have access to the Serial tab only for receivers marked for QCS Serial tracking. Details about how to use this tab are found in the section describing the QC Disposition Receiver form, starting on page *204*.

QC Create IP Receiver



QC Create IP Receiver

DESCRIPTION: Manually create a receiver for each step of the Quality Plan for Job Item.

Field Descriptions:

- Warehouse: Displays current SyteLine warehouse. To change, select Actions/Change Warehouse from the main menu
- Job: Select a released Job from the list. Job, suffix, item and description will display
- First Article Receiver Only: If this box is checked then a First Article receiver will be created.

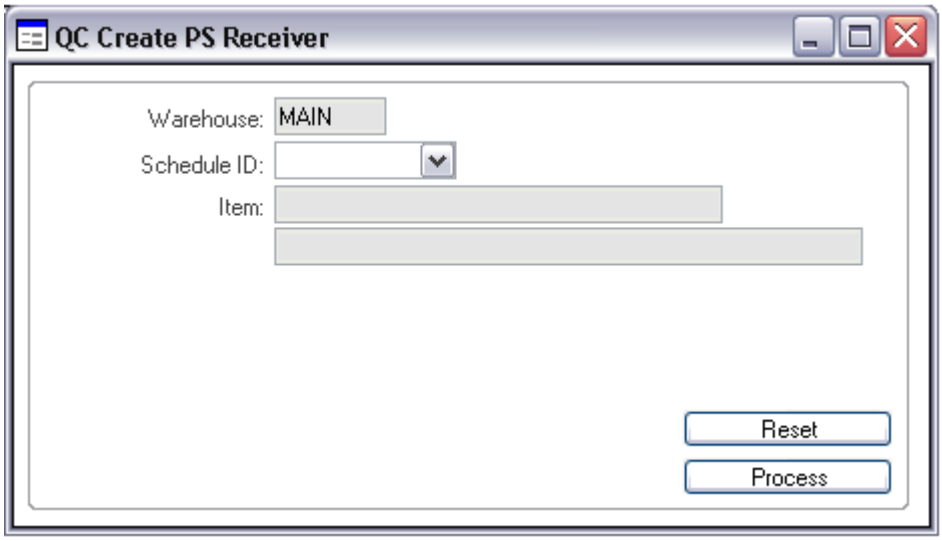
Buttons:

- Reset: Clear the selected job, and allow selection of a different job
- Process: If the job item is a QC IP Item, create a receiver for each step in the plan that does not already exist for this job

Notes:

1) **For any receiver created, all QC messages will be displayed in the same message box**
2) **If the QC IP Parameters are set up to 'Display the QC Window', a window will be displayed for each step of the Quality Plan, allowing the user to set the QC Lot and/or add notes to the receiver.**
3) **If the QC IP Parameters are set up to 'Default for QC IP Tags', a 'RECEIVED' tag will be generated for each step of the Quality Plan**

QC Create PS Receiver



QC Create PS Receiver

DESCRIPTION: Manually create a receiver for each step of the Quality Plan for PS Item.

Field Descriptions:

- Warehouse: Displays current SyteLine warehouse. To change, select Actions/Change Warehouse from the main menu
- Schedule ID: Select a Production Schedule from the list. Schedule, Item, Release date, and description will display

Buttons:

- Reset: Clear the selected PS, and allow selection of a different PS
- Process: If the PS item is a QC IP Item, create a receiver for each step in the plan that does not already exist for this PS

Notes:

1) **For any receiver created, all QC messages will be displayed in the same message box.**

2) **If the QC IP Parameters are set up to 'Display the QC Window', a window will be displayed for each step of the Quality Plan, allowing the user to set the QC Lot and/or add notes to the receiver (see above).**

3) **If the QC IP Parameters are set up to 'Default for QC IP Tags', a 'RECEIVED' tag will be generated for each step of the Quality Plan.**

Record Receiver Disposition and Test Results

To record the disposition of a receiver, or to enter test results, the user will access the QC IP Job or PS Inspect/Disposition Form. From here, specific IP receivers can be found, their status and quantities checked. Once the desired receiver is identified, the user can then access the form to either disposition or record test results against that receiver. Several options are available and detailed below, followed by descriptions of the forms used for data entry.

Quality Plan Tracking Options

There are five different levels of detail of data that can be tracked on a Quality Plan in QCS. Different options can be used on individual receivers.

Status Only

Only one piece of data is required for a receiver. Access the Disposition form and check the 'QC Receiver Complete' checkbox. This can be used for checkpoints that verify a machine setup, check job documentation or check completion of automated tests.

Status and Disposition

In addition to setting the receiver as complete, when appropriate, enter the quantity that was received into this receiver and its disposition (Accepted or Rejected) using the Disposition form.

Status, Disposition, and Batch Test Results

Add to the status, or status and disposition, the results for any tests defined for this IP item. Enter one or more batches of test results, indicating how many were tested, how many failed, and test data (see page *212*).

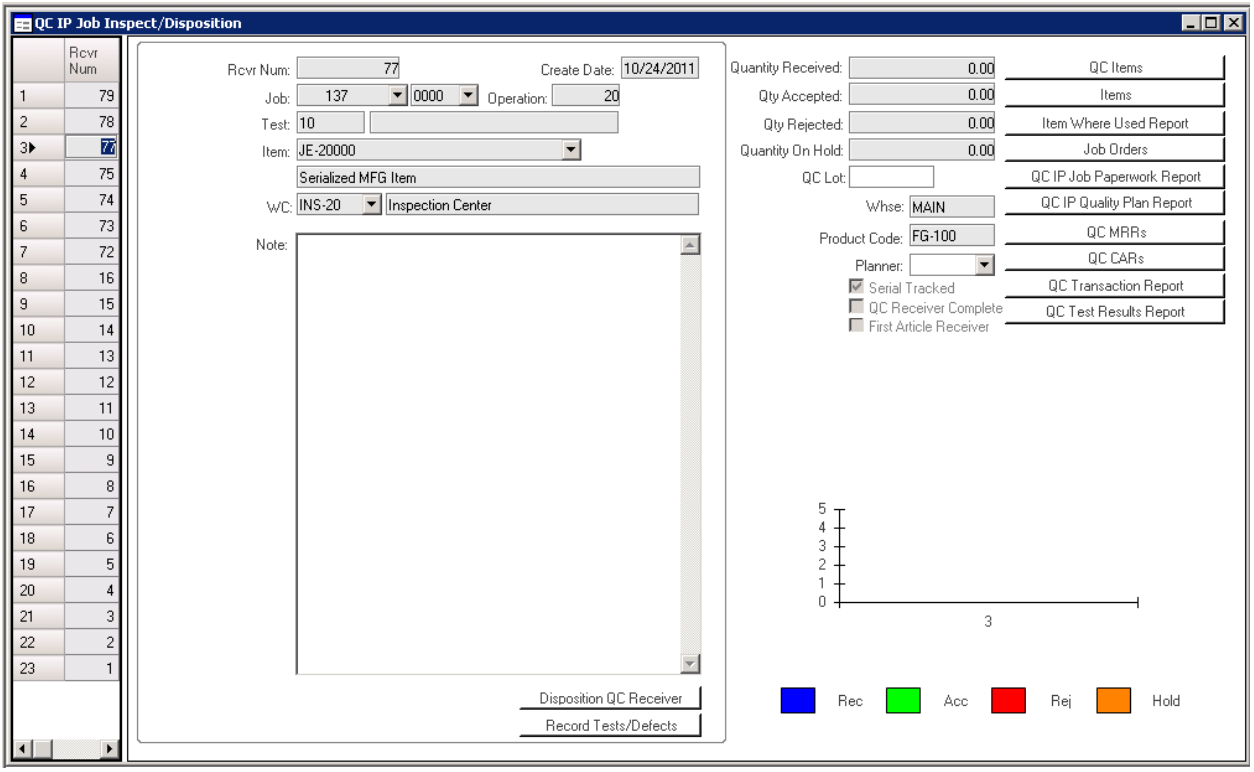
Status, Disposition and Individual Test Results

Alternatively, add to the status, or status and disposition) the results for any test – recording each item's test results individually. If you are entering test results on a receiver marked for QCS Serial tracking, this technique is required for Test Result entry. The serial numbers must be defined prior to entering the test results. For non-QCS Serial tracked items, an entry will be created for each item in the test set.

Status, Disposition, Optional Test Results, Defect Code Tracking

Another alternative (or add-on) from the Test Results form: Indicate how many items had defects for the each defect code.

QC IP Job Inspect/Disposition



QC IP Job Inspect/Disposition

DESCRIPTION: Displays (filtered) list of IP Job. Allows access to dispositiong or entry of test results/defects.

Buttons:

- Disposition QC Receiver: Takes user to QC Disposition form (page *204*) for the current receiver
- Record Tests/Defects: Takes user to Test Result Entry (page *212*) for the current receiver. Only enabled if the current receiver's item has current tests defined

Notes:

1) **If an MRR has been created for a receiver, the MRR is dispositioned from a different form. Please access the QC MRRs form (page *223*).**
2) **If Inspection/Tests have been created for the item, the 'Record Tests/Defects button will be highlighted. If no tests are set up, the button will be disabled.**

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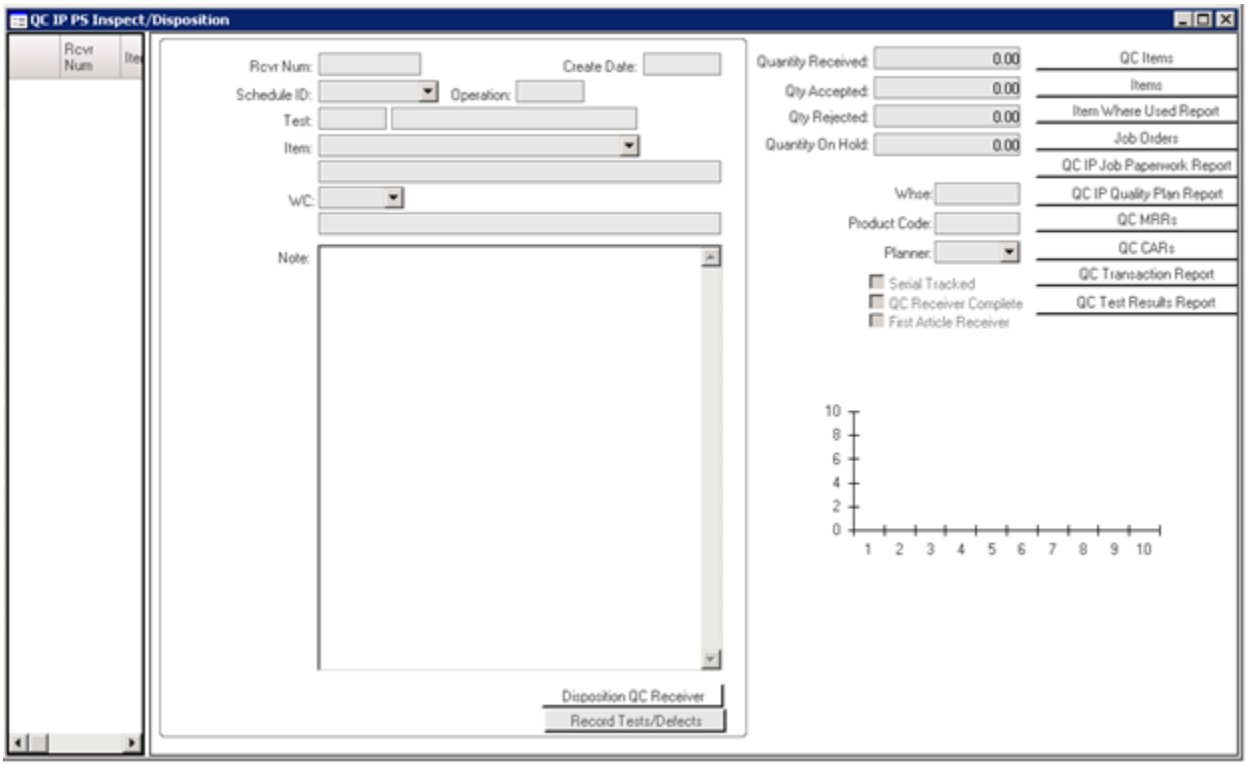
QC IP PS Inspect/Disposition



QC IP PS Inspect/Disposition

DESCRIPTION: Displays (filtered) list of IP Production Schedule Receivers. Allows access to dispositioning or entry of test results/defects

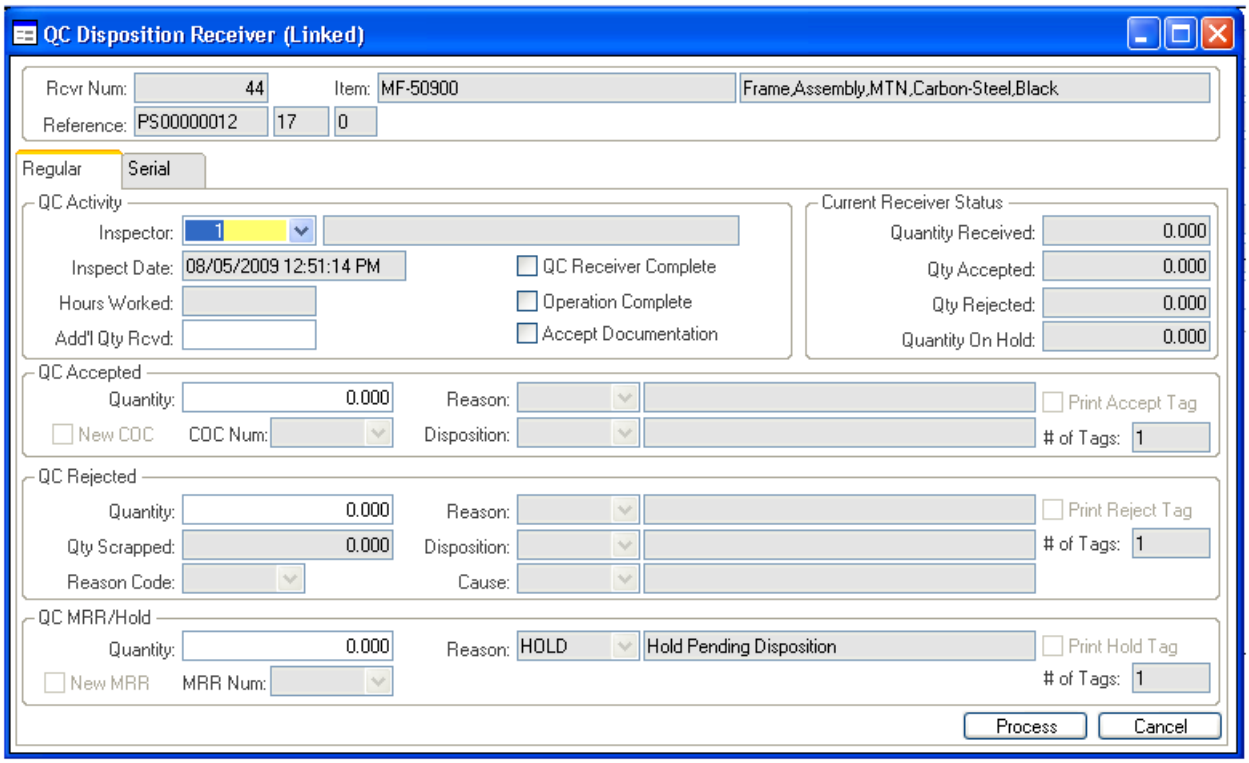
Buttons:

- Disposition QC Receiver: Takes user to QC Disposition form (page *204*) for the current receiver
- Record Tests/Defects: Takes user to Test Result Entry (page *212*) for the current receiver. Only enabled if the current receiver's item has current tests defined

Notes:

1) **If an MRR has been created for a receiver, the MRR is dispositioned from a different form. Please access the QC MRRs form (page *223*).**
2) **If Inspection/Tests have been created for the item, the 'Record Tests/Defects button will be highlighted. If no tests are set up, the button will be disabled.**

QC Disposition Receiver



QC Disposition Receiver (Linked)

DESCRIPTION: This form is used to enter the disposition for items in QCS for a selected receiver. This form should only be accessed from the QC Inspect/Disposition forms.

Field Descriptions:

Header

Displays the receiver number, Item number and description, Job/Suffix or PS ID, Operation, WC and WC Description

Message: If QC General Parameter 'Check for Test Results' is set to 'Alert-If Defined', a message will be displayed upon entering this form if there are test results defined for this QC Item. If 'Check for Test Results' is set to 'Required-If Defined' and there are test results defined for this QC Item, you will not be able to enter a disposition until/unless there is at least one test result recorded for the receiver. If 'Check for Test Results' is set to 'Required-Always', you will not be able to enter a disposition until/unless there are test results recorded for this receiver.

Field Descriptions:
Regular Tab
QC Activity

- Inspector: If QC General Parameter 'Inspector Validation' is set to 'None', no inspector number is required. If the parameter is set to 'Employee', you must enter a valid employee number. The employee name will display. The map inspector to receiver field on the QC General Parameters form (page *55*)
- Inspect Date: Defaults to and displays the system date/time
- Hours Worked: If creating a Job Transaction from this disposition, this value will be moved to the job transaction's 'hours worked' field
- Add'l Qty Rcvd: Enter the quantity for any new material moved into this receiver. This is the total quantity being dispositioned on with this transaction
- QC Receiver Complete: Manually check box when the receiver is completed
- Operation Complete: If creating a Job Transaction from this disposition, this value will be moved to the job transaction's 'operation complete' field
- Accept Documentation: User defined

Current Receiver Status

- Quantity Received: Displays the quantity received into QC for this receiver
- Quantity Accepted: Displays the quantity accepted to date
- Quantity Rejected: Displays the quantity rejected to date
- Quantity On Hold: Displays the quantity on hold to date

QC Accepted

- Quantity: Enter the quantity to accept for this transaction
- Reason: If the QC General Parameter 'Prompt For Reason On Accept' is checked, and a non-zero QC Accepted quantity is entered, enter a valid QC Reason; its description will display.

If 'Prompt for Reason on Accept' is not checked, the system will default to and display the first Reason for IP/Accepted, and it cannot be changed. Disposition: If a non-zero QC Accepted quantity is entered, enter a valid Disposition; its description will display.

- Print Accept Tags: If a non-zero QC Accepted quantity is entered, check box if you wish to print 'Accept' tags for this transaction, uncheck box if you do NOT wish 'Accept' tags for this transaction. Value defaults from QC IP Parameter 'Default for IP Inspection Tags'
- # of Tag: If a non-zero QC Accepted quantity is entered, and Print Accept Tag is checked, enter the number of 'Accept' tags to be printed for this transaction. Defaults to 1
- New COC: Disabled for IP Receivers
- COC Num: Disabled for IP Receivers

QC Rejected

- Quantity: Enter the quantity to reject for this transaction. If the value in QC IP Parameter 'Create MRR for Reject' is set to 'Prompt' – a message box will appear asking if you want the reject quantity to create an MRR:

If so, the quantity will be moved to QC Hold and processed as such (see below). If the QC IP Parameter 'Create MRR for Reject' is set to 'Always' – the quantity will ALWAYS be moved to QC Hold and processed as such (see below). If set to 'Never': the quantity will stay in the QC Rejected area.

- Qty Scrapped: If create a Job Transaction with this disposition, this value will be moved to the 'Qty Scrapped' (regardless of disposition quantities). If greater than zero, a Reason Code is required.
- Reason Code: If Qty Scrapped is greater than zero, enter the SyteLine reason code
- Reason: If the QC General Parameter 'Prompt for Reason on Reject' is checked, and a non-zero QC Rejected quantity is entered, enter a valid QC Reason; its description will display. If 'Prompt For Reason on Reject' is not checked, the system will default to and display the first Reason for IP/Rejected, and it cannot be changed.

- Disposition: If a non-zero QC Rejected quantity is entered, enter a valid Disposition; its description will display.
- Cause: If a non-zero QC Rejected quantity is entered, optionally enter a valid Cause; its description will display.
- Print Reject Tag: If a non-zero QC Rejected quantity is entered, check box if you wish to print 'Reject' tags for this transaction, uncheck box if you do NOT wish 'Reject' tags for this transaction. Value defaults from QC IP Parameter 'Default for QC IP Inspection Tags'
- # of Tags: If a non-zero QC Rejected quantity is entered, and Print Reject Tag is checked, enter the number of 'Reject' tags to be printed for this transaction. Defaults to 1

QC MRR/On Hold

- Quantity: Enter the quantity to put on hold for this transaction
- Reason: If the QC MRR/On Hold Quantity is non-zero, enter a reason code for Supplier/QCHOLD.
- Print Hold Tag: If a non-zero QC MRR/On Hold quantity is entered, check box if you wish to print 'QCHOLD' tags for this transaction, uncheck box if you do NOT wish 'QCHOLD' tags for this transaction. Value default from QC Supplier Parameter 'Default for QC IP Inspection Tags'
- # of Tags: If a non-zero QC MRR/On Hold quantity is entered, and Print Hold Tag is checked, enter the number of 'QCHOLD' tags to be printed for this transaction. Defaults 1
- New MRR: If a non-zero QC MRR/On Hold quantity is entered, either a new MRR must be created for the MRR quantity, or the quantity must be added to an existing MRR for this receiver. If you want to create a new MRR, this box should be checked. If not checked, MRR Num must have a valid MRR number. Defaults to checked
- MRR Num: Select an existing MRR for this receiver. Current quantity MRR/On Hold will be added to that MRR. If there are no existing MRRs for this receiver, New MRR must be checked.

Buttons:

- Process: Disposition Accepted/Rejected/MRR for the receiver. A 'Disposition Completed' message will display when processing is done. If an MRR was created as a result of this transaction, the message will additionally show the new MRR number:

- Cancel: Exit the form without processing

Note:

1) **If you disposition more than you receive, a message will advise and ask if you want to continue.**

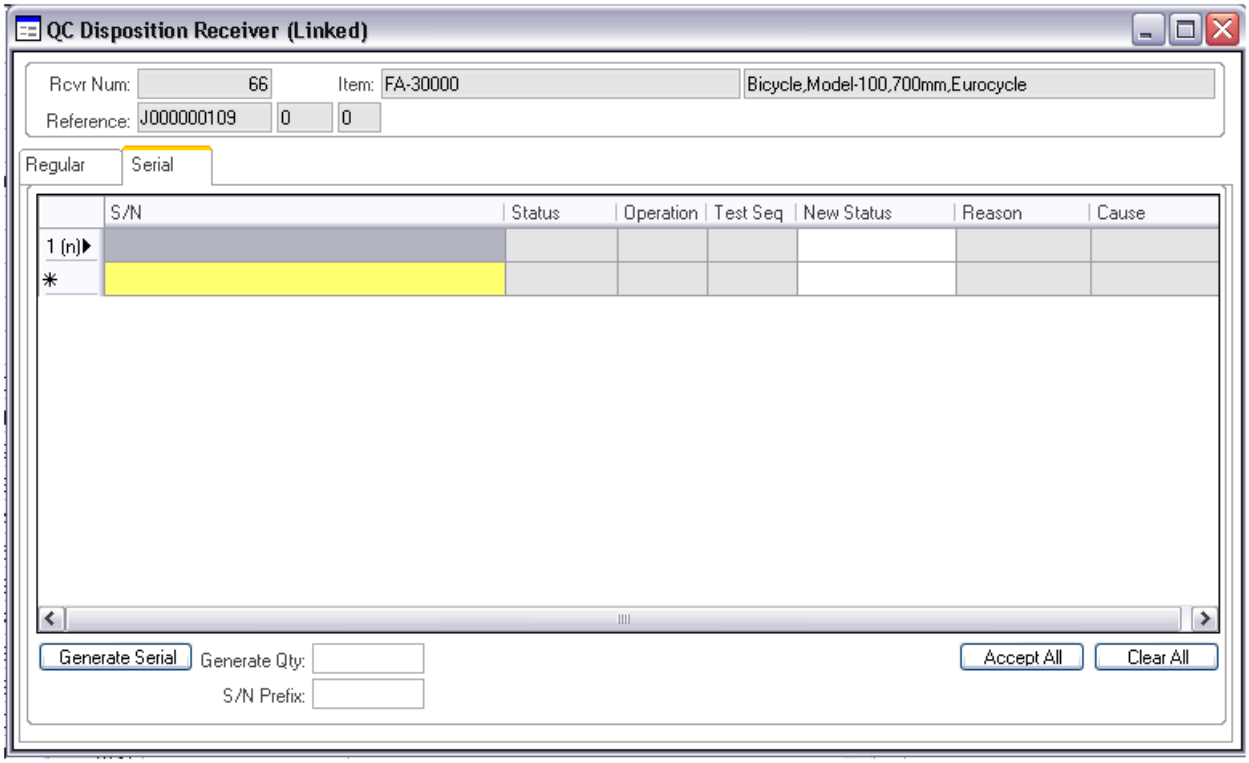
If the receiver being dispositioned is marked for QCS Serial Tracking, several changes occur to the Disposition form:

- On the 'Regular' Tab (see above), the user will not have access to the QC Accepted Quantity, QC Rejected Quantity or the QC MRR/Hold Quantity.

- The 'Serial' Tab will be enabled.

- A QCS Serial number must be generated for each item on the receiver. Each QCS Serial Number will be individually dispositioned, and the quantities will be added up and loaded into the 'Regular' Tab quantity fields.

- Once the QCS Serial numbers have been dispositioned, the user must return to the 'Regular' tab to choose the appropriate Disposition/Reason/Cause Codes and process the disposition.



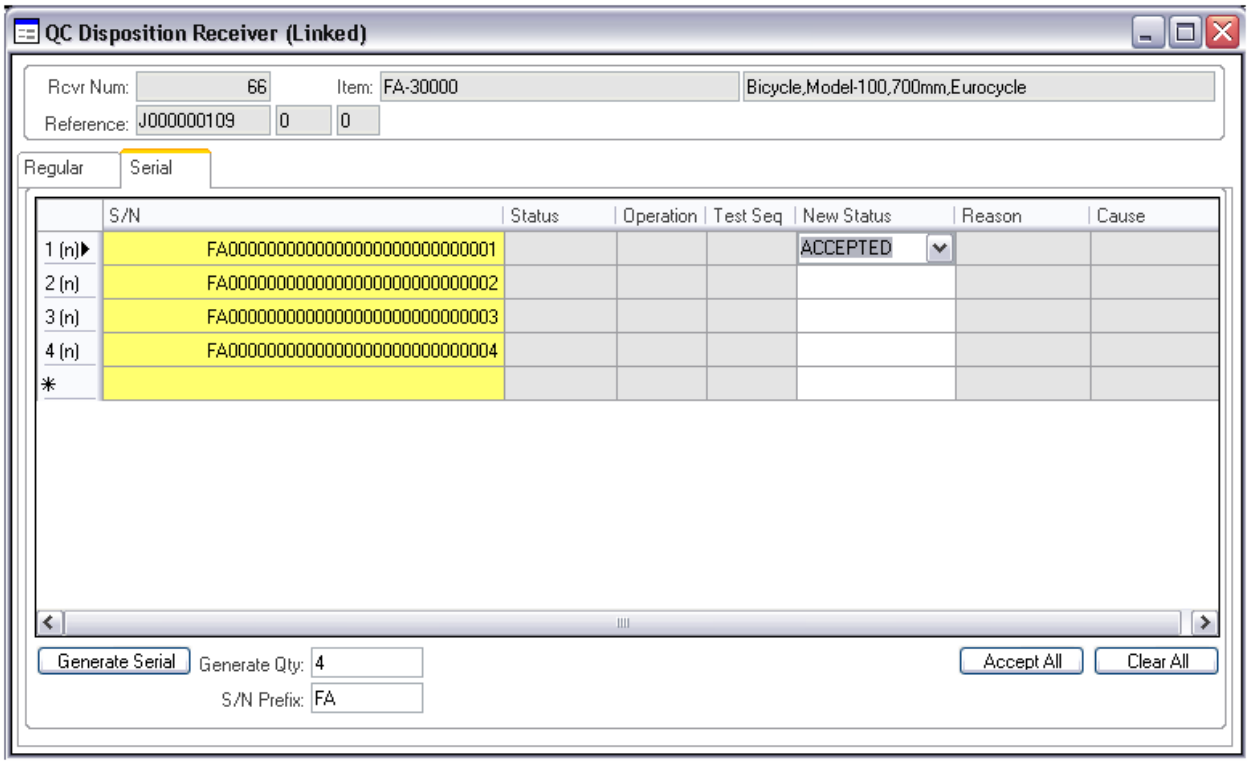
Serial Tab

- Generate Qty: If additional QCS Serial Numbers are required, enter the number to create
- S/N Prefix: If desired, enter the QCS Serial Number prefix to be used for the numbers to be generated
- <Generate Serial> Button: creates new QCS Serial Numbers for this receiver based on the parameters entered (above). When new QCS Serial Numbers are created, they are assigned a status of 'Received'

Serial Grid

- S/N: QCS Serial Number. New serial numbers can be generated (see above), or typed manually.
- Status: (Starting) status of this QCS Serial Number for this transaction
- Operation: Not applicable for the Supplier module
- Test Seq: Not applicable for the Supplier module

- New Status: Enter new status of the associated QCS Serial Number, or select from drop-down box
- Reason: Display only
- Cause: Display only



- Accept All: Mark all QCS Serial Numbers with a status of 'Received' to a status of 'Accepted'
- Reject All: Mark all QCS Serial Numbers with a status of 'Received' to a status of 'Rejected'

When you are done marking the status (Accepted, Rejected, QCHold, Received), return to the 'Regular' Tab. You will see the total of each status in the Qty Accepted, Rejected, MRR/Hold fields. You can now indicate the Reason, Disposition and Cause codes for each status.

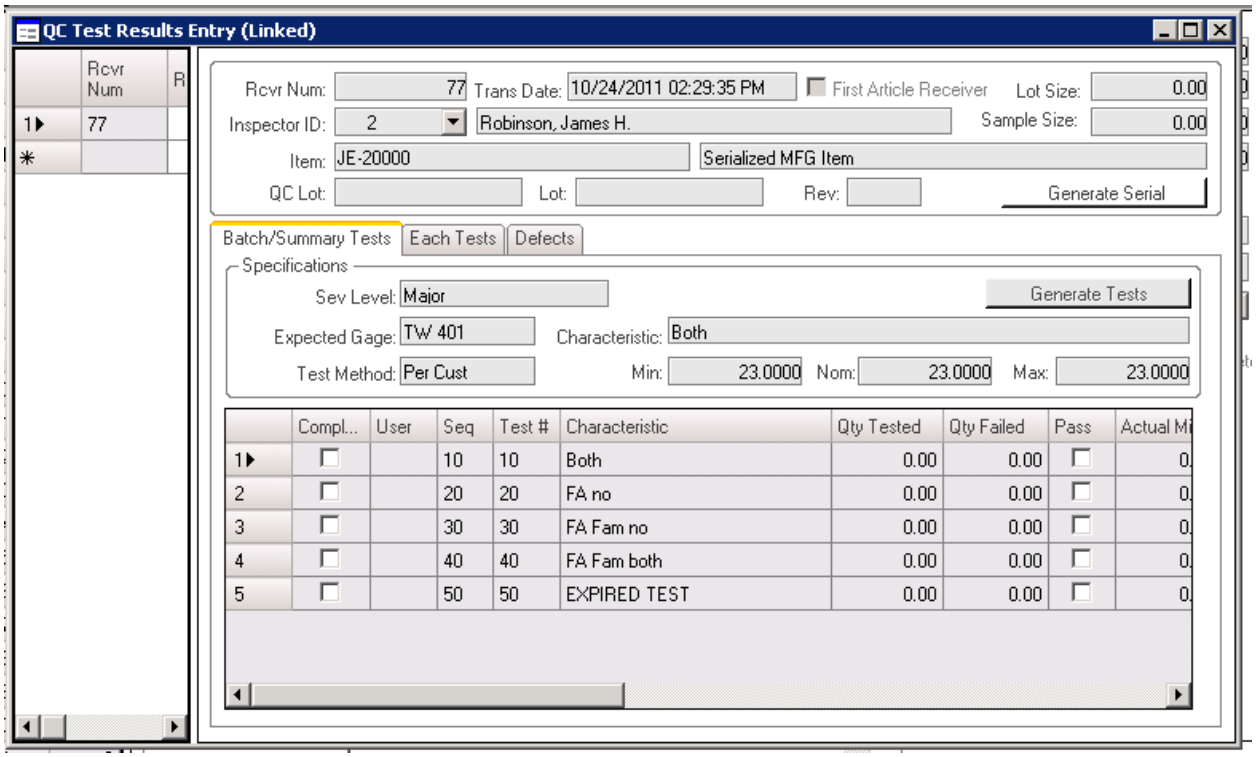
If you wish to set a different reason code, that serial number needs to be dispositioned in a separate transaction (similar to a Miscellaneous Receipt transaction for material).

All other functionality remains the same on this tab, for a serial-tracked receiver.

Note:

1) **To reverse the effect of a previous disposition transaction, you may change the New Status of a serial number BACK to RECEIVED. This will accumulate as a 'negative' against the original status.**

QC Test Results Entry



QC Test Results Entry (Linked)

DESCRIPTION: Enter the results of the tests specified for this QCS Item. Multiple sets of test results can be created for a receiver.

Field Descriptions:
Header

- Rcvr Num: QCS Receiver number displays
- Trans Date: Defaults to and displays current date for new test sets
- Inspector ID: Employee number of the person performing the inspection, name displays
- Item and Description of item receiver displays
- QC Lot: User defined

- Lot: User defined
- Rev: User defined
- Sample Size: User defined
- Lot Size: User defined
- Generate Serial: Only active if the QC Item is QC Serial tracked. Used when having the system generate sequential serial numbers for recording test results.

Batch/Summary Tests Tab

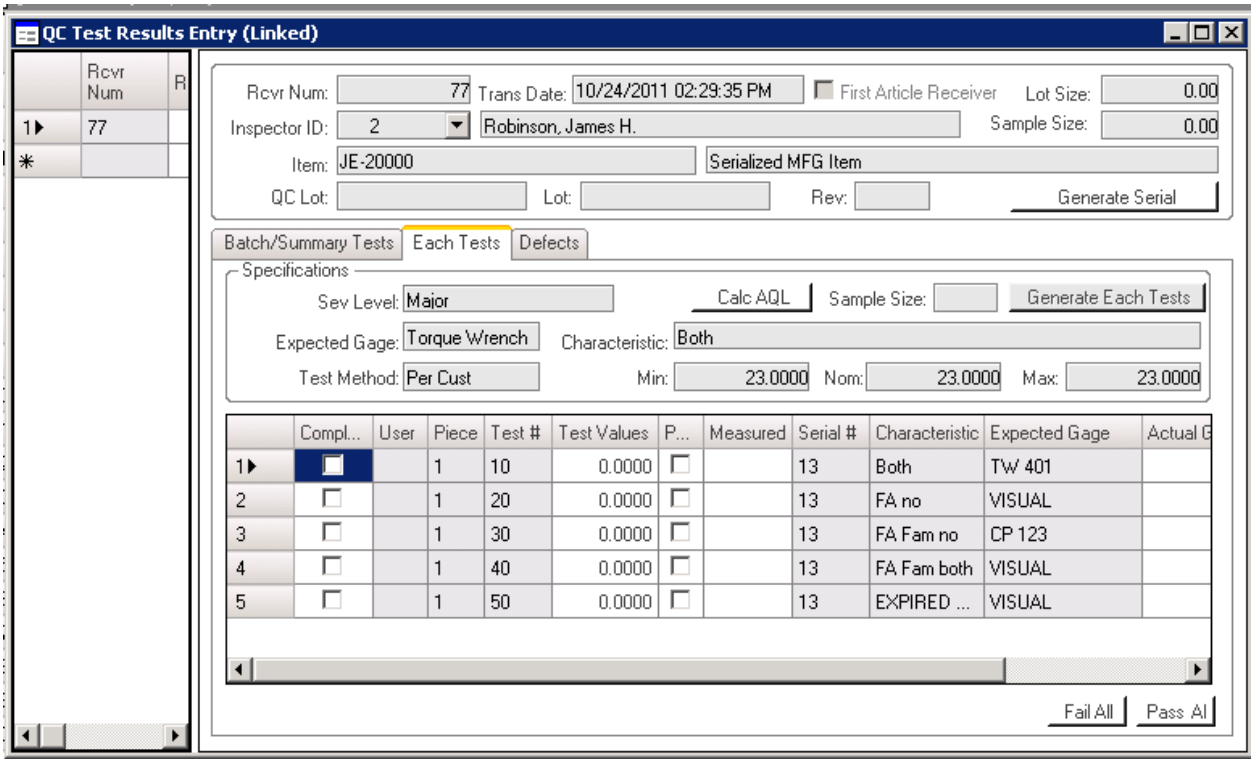
Specification

Expected Gage, Test Method, Characteristic, Expected Minimum, Maximum and Nominal values are all set based on the test (Item detail). The detail data displays based on the current test selected in the browser.

Browser

- Seq: Order which inspections are to be performed
- Test #: Unique test ID number
- Characteristic: Description (see QC Item Test Setup)
- Qty Tested: Enter value
- Qty Failed: Enter value
- Pass: Optional. Check for 'pass' or leave unchecked for 'fail'
- Actual Min: Enter value
- Actual Nom: Enter value
- Actual Max: Enter value
- Gage Group: Gage group name from the gage Groups Form
- Gage Expired: Checked if the Expected gage is expired (out of calibration). If not checked, the Expected gage is not expired.
- Expected Gage: Display only (see QC Item test set up)

- Decr: description of the expected gage
- Actual gage: enter the identification for the actual gage used
- Desc: Description of the actual gage used
- Measured: Enter optional text information
- Expected Gage: Display only (see QC Item Test Setup)
- Test Method: Display only (see QC Item Test Setup)



Each Tests Tab

Note: this option is required if the receiver is QCS serial-tracked

Specification

Expected Gage, Test Method, Characteristic, Expected Minimum, Maximum and Nominal values are all set based on the test (Item detail). The detail data displays based on the current test selected in the browser.

Calc AQL

The Calc AQL button will calculate the sample size if the following have been previously set up:

- Calculate AQL for Tests has been selected in the QC Enterprise parameters (see page *75*)
- The QC Sampling Criterias Form has been filled out (see page *98*). Remember this form sets the number of completed receivers that the system will use to sum the number of rejected parts. The values in this form are then used by the system to determine if Loosened, Normal or Tightened sampling rates will be used
- The QC test Plan Sampling Rates from has been filled out (see page *99*). Remember the system uses this form to determine the percentage of the quantity received for calculating the AQL sample size.

Notes:

1) **When the Calc AQL button is selected it will enter the Sample Size based on the system calculations outlined above**
2) **The Sample Size is a suggested size and it may be changed prior to selecting the Generate Each Tests button**
3) **If there are not enough closed receivers to meet the settings in the QC Sampling Criterias Form then the Tightened Sampling Plan is used by the system.**

Browser

- Complete: When checked this designates that specific test as being completed and changes the rest of the row to read only. This box is manually checked and unchecked. If there are user initials associated with the person who is logged in, then when checked the User box will also be populated with the User initials. The complete designation is used for filtering purposes for some reports (SPC reporting) to identify tests that failed but are complete, from tests that were never performed.

- User: Is auto-populated with the logged in user's initials when a specific test is marked as complete. This can be used to have different users complete different tests on the same QC Rest Results Entry form.

- Piece: Sample #

- Test #: Unique test ID

- Test Values: Enter value

- Pass: Optional. Check for 'pass' or leave unchecked for 'fail'

- Measured: Enter optional text information
- Serial #: Displayed if serial tracked item
- Characteristic: Description (see QC Item Test Setup)
- Expected Gage: Will show the Expected gage that was entered when the test was set up under QC items.
- Actual Gage: Use the drop down menu to select an alternate gage as the actual gage used.
- Desc: Displays only if an Actual Gage was selected. The field is updated when the test record is saved.

Process:

- Enter the inspector ID
- Optionally enter/edit Sample Size, QC Lot, Lot, Rev, and Lot Size
- Select either the Batch or Each Tests tab

If Each is selected:

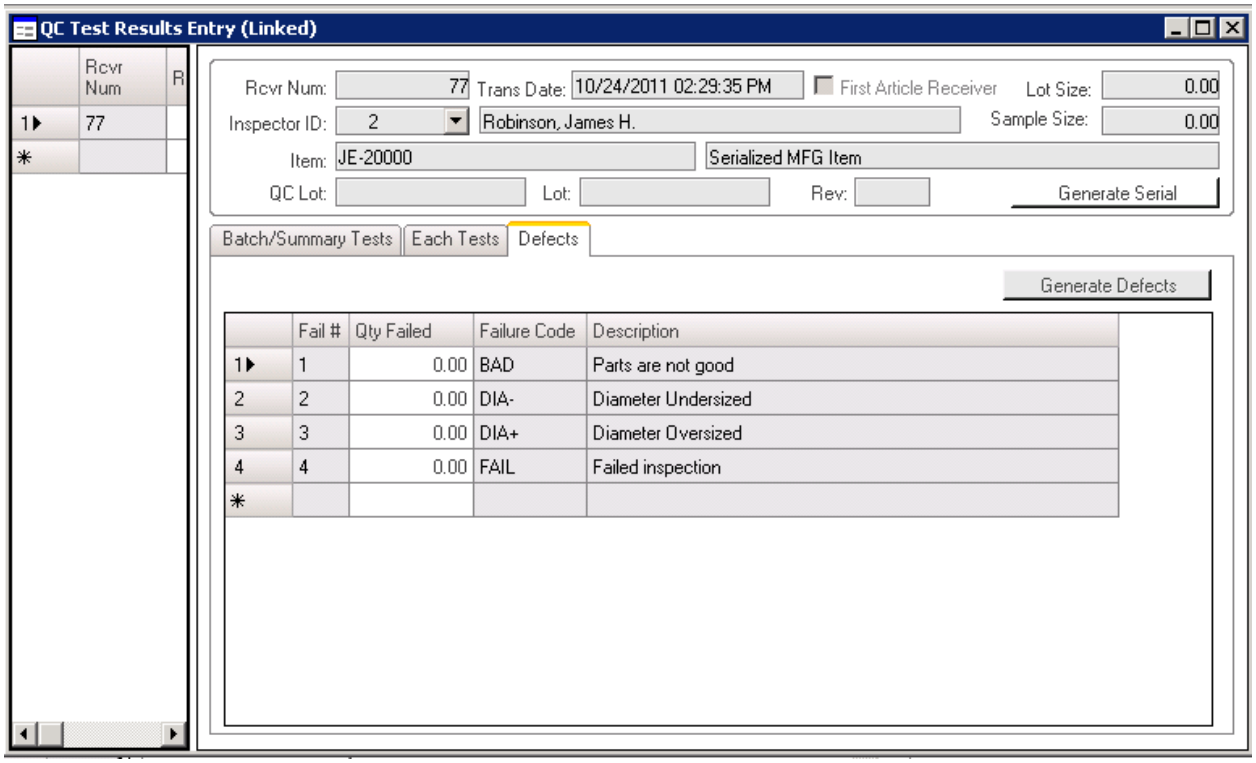
- If item is NOT QCS serial tracked, enter the number of entries you wish to have created for each test OR select the Calc AQL button to have the system enter a recommended Sample Size
- If item IS QCS serial tracked, one entry will be created for (and associated with) each serial number that exists for this receiver. If you need to create serial numbers for this receiver, use the <Generate Serial> button.

- Select the <Generate Tests> button
- You will receive a message box: 'Test set creation succeeded' <OK>
- Enter data as required for this receiver

Note:

1) **Test results are independent of dispositioning.**

QC Test Results Entry - Defects



QC Test Results Entry (Linked) - Defects tab

DESCRIPTION: Enter number of failures per code for this receiver. Please see the QCS Setup Section of this manual for Failure Code setup.

Process:

- Access the Supplier Inspect/Disposition form
- Select a Receiver
- Select the <Record Tests/Defects> button
- Select the 'Defects' tab
- Enter an Inspector ID

There are two different methods to select/enter Defect Quantities:

- (see the first screen image earlier in this section)Select the 'Generate Defects' button

- An entry will be created for each Failure code associated with the Supplier Ref Type ('P')
- Enter the Qty Failed as applicable for this receiver for a given failure code

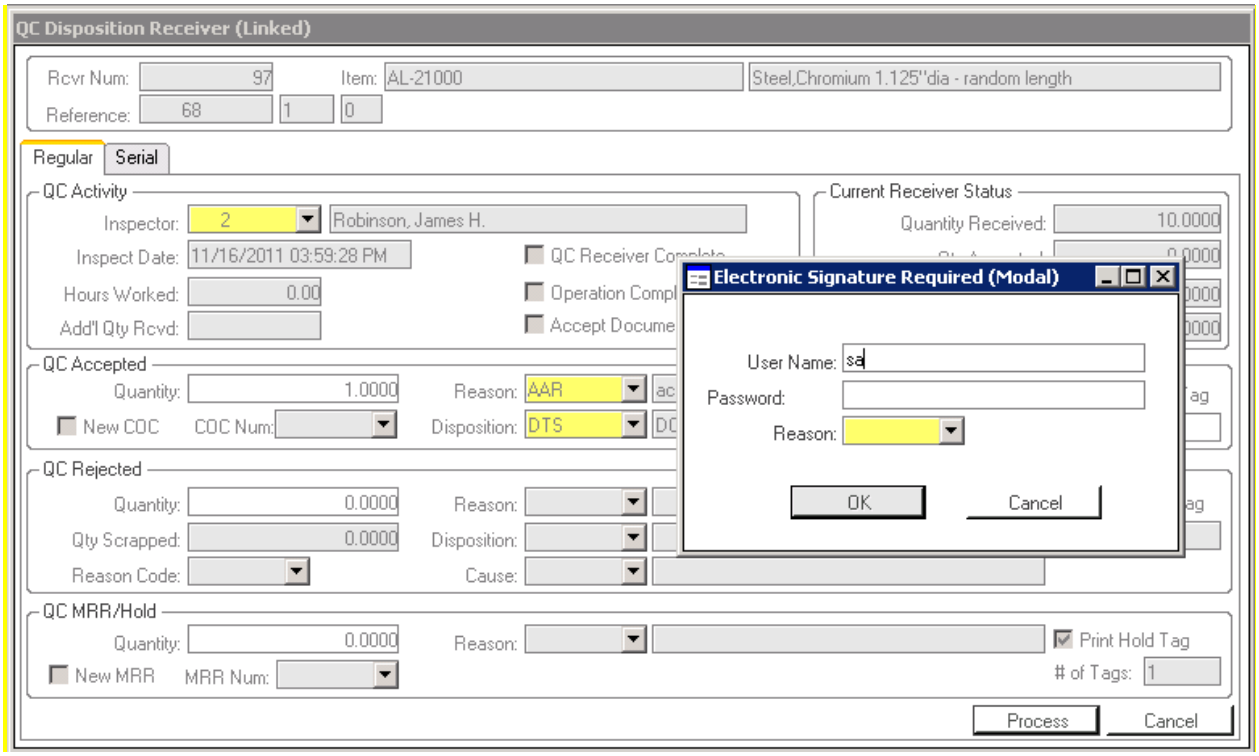
- (see the second screen image earlier in this section) Begin to type the defect code into the Failure Code column (or select the drop down arrow)
  - Select the specific Failure code you want and hit enter
  - Enter the Qty Failed
  - NOTE: This method allows you to select which Failure Codes show and may be easier than creating an entire list of Failure Codes and trying to find only the codes that are relevant for that receiver.

Note:

1) **Defects can only be recorded against QC Items with at least one Test defined.**

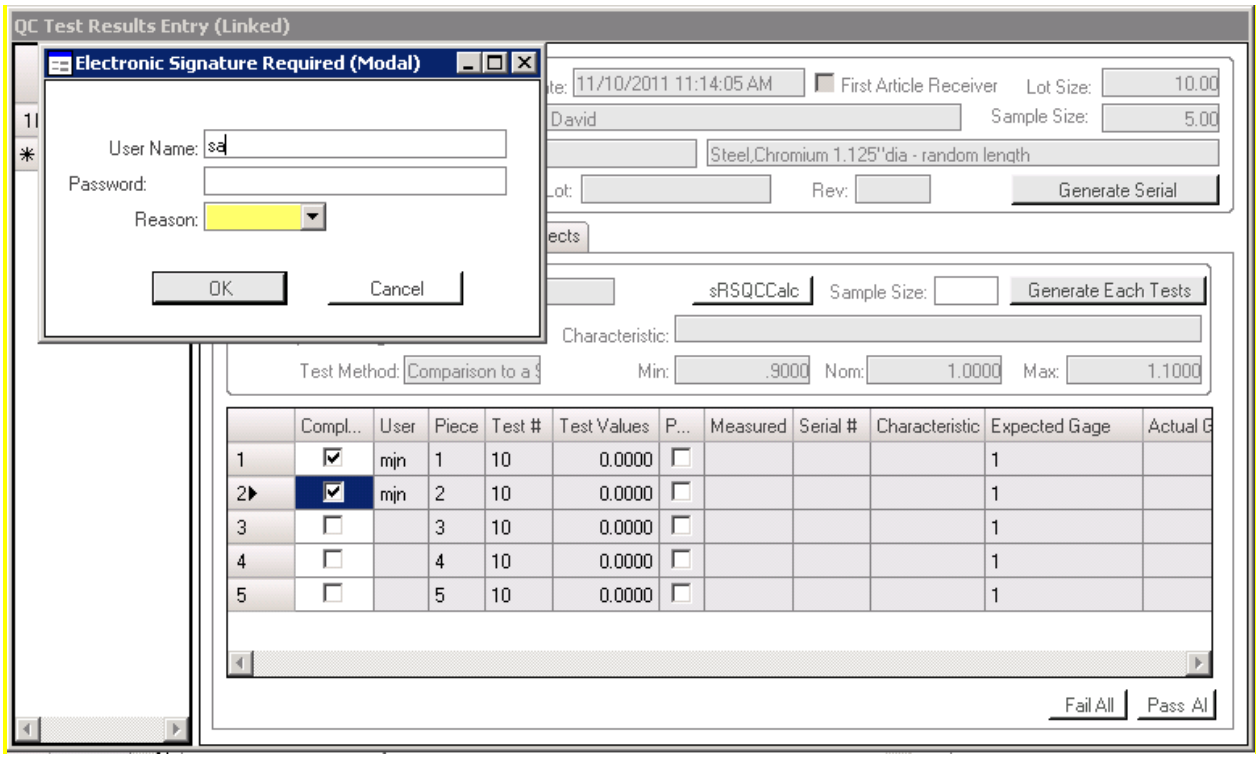
Using Electronic Signatures in QCS

Once Electronic Signatures are turned on and user(s) are authorized, you can now use the functionality (See page *36*). Upon pressing Process during a receiver disposition or MRR disposition, you will see the Electronic Signature Required box;



You must fill in the user name and password of an authorized signer (you do not have to use the user name and password of the logged in user; any authorized signer may fill this in.), and you must select an electronic signature reason code.

Similarly, when recording Each Tests, if electronic signatures is enabled, the signature box will display when checking or unchecking the “Complete” check box in the test results grid;



Notes:

1) **This functionality is only available if you are running Infor SyteLine version 8.03 or later.**

2) **Please refer to the Infor SyteLine version 8.03 or later documentation for electronic signatures for additional information and best practices.**

There are several options for handling material that is non-conforming, or needs additional testing/review:

Method 1

The material may be immediately dispositioned as REJECTED. The appropriate reason code, disposition code and cause codes are recorded for the transaction. Where desired (and as coded), a Material Move or Material Issue can then be run for the rejected items.

Method 2

When identifying a quantity as REJECTED while dispositioning, you can set the parameters to ask the user if they wish this particular set of rejected items to be moved to an MRR. If so, the items will be put ON HOLD, and either applied to an existing MRR, or a new MRR will be created. If moved to an MRR, final disposition must be made from the MRR.

Method 3

The material may be dispositioned as MRR/ON HOLD. These items can be added to an existing MRR for this receiver, or a new MRR can be created. Final disposition must be made from the MRR.

Notes:

1) **An MRR can only be created during the disposition of a Receiver for a QC item, or via the Quick MRR/Receiver Utility (based on parameter settings).**
2) **Creating an MRR does not move material**
3) **Final disposition of the material from the MRR can move material, based on your disposition code(s).**
4) **Once an MRR is created, it cannot be deleted.**
5) **An MRR is linked to one and only one receiver.**
6) **Multiple MRRs can be created for one receiver.**
7) **MRR numbers are system-generated.**

Using one or more of the above methods, a process will be set up to incorporate QC into your current or new process flow for non-conforming material. A typical flow might be:

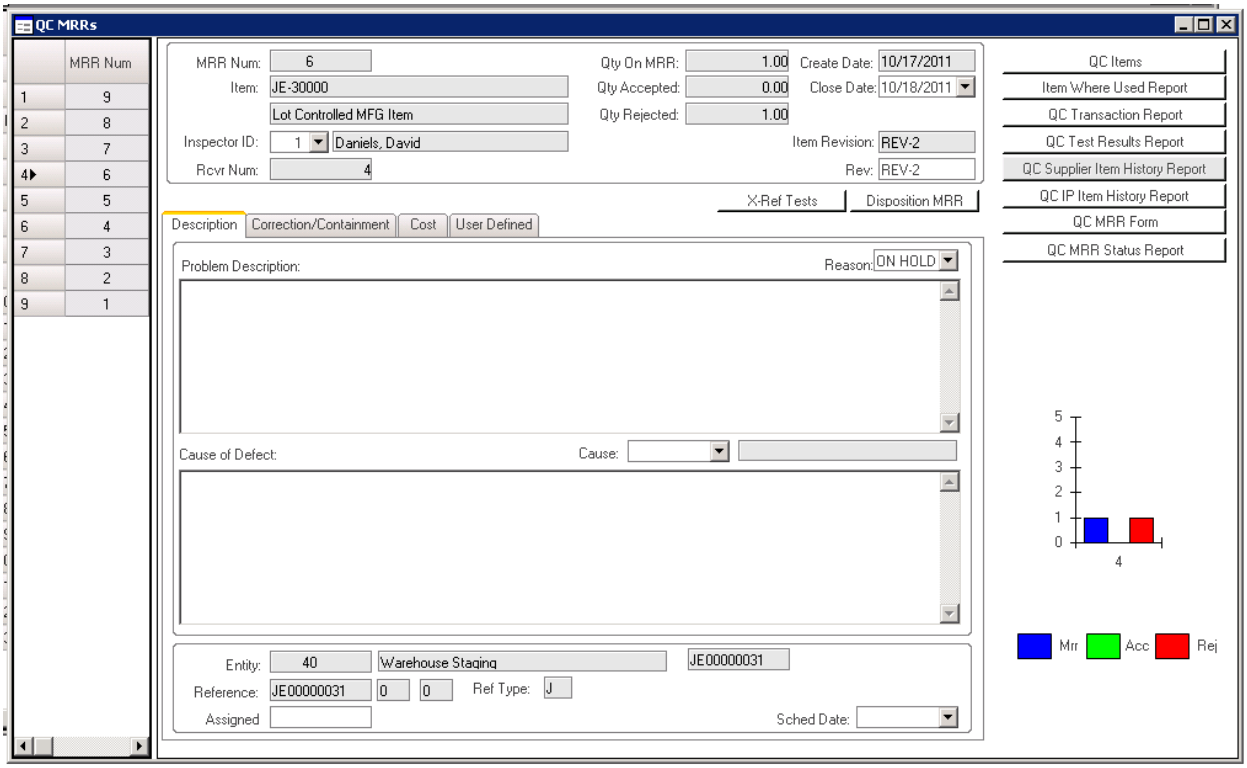
1) Discrepant material is identified and entered into QCS as rejected or MRR/On Hold; creating an MRR.

2) A designated individual is responsible for notifying the appropriate people (e.g. members of a Material Review Board/MRB) of the issue and calls a meeting to address the MRR.

3) The MRB meets and decides either a) on a disposition or b) assigns someone to investigate and schedule a follow-up meeting for final disposition (this may result in the generation of a CAR to ensure that the cause of this incident is corrected to prevent a reoccurrence).

4) The discrepant material is dispositioned

5) The MRR is completed.



QC MRRs

DESCRIPTION: Form is used to edit values on MRRs. No add or delete is allowed.

Field Descriptions:

Header

Displays the MRR #, Create Date, Ref Type, Item Number and Description, Receiver #, Quantity on the MRR, MRR Quantity Accepted, MRR Quantity Rejected

- Close Date: Enter a date to indicate there will be no further action on this MRR. Clear date to re-open the MRR
- Item Revision: is the SyteLine Item revision and is read only
- Rev: User defined

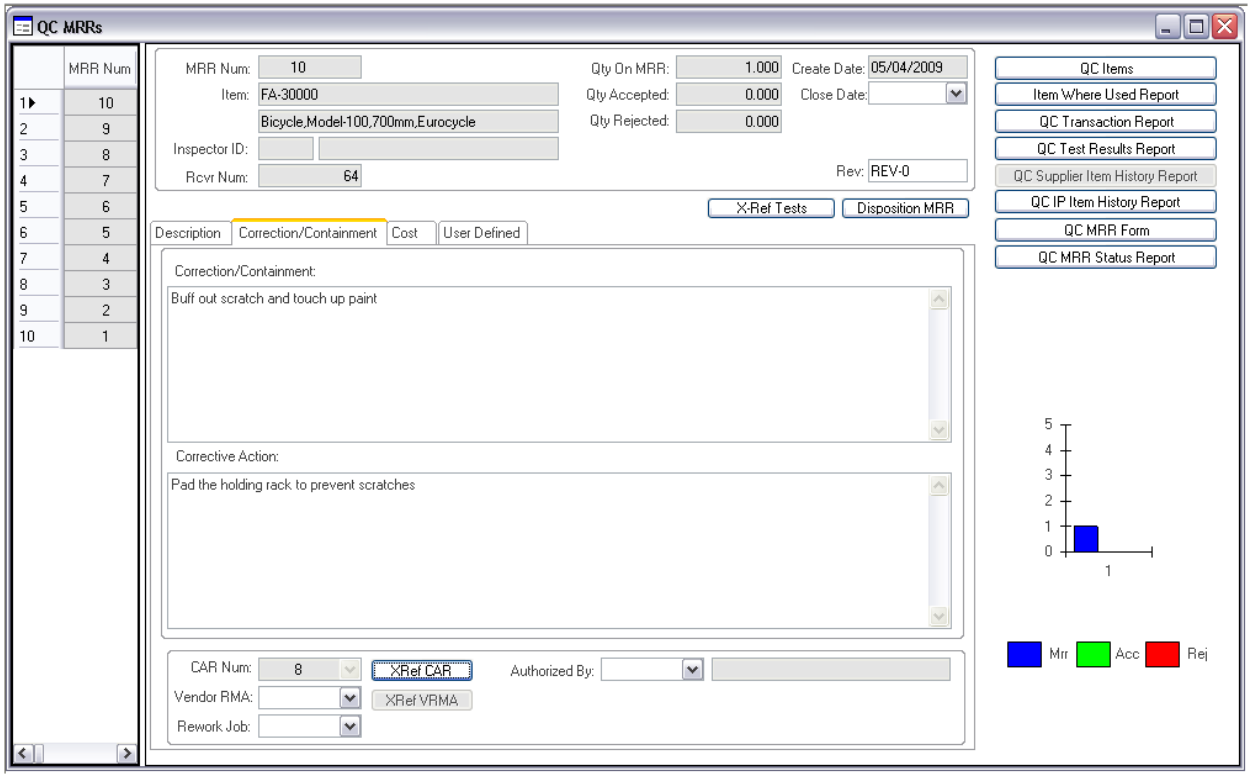
Descriptions Tab

Displays vendor number and name (Entity), if the receiver references a vendor, and the PO Num/Line/Release (Reference), if the receiver references one

- Problem Description: User defined (400 characters)
- Reason: Select a reason code
- Cause of Defect: User defined (400 characters)
- Cause: Enter a code for the underlying problem which resulted in the MRR being created
- Scheduled Date: User defined
- Assigned to: User defined

Buttons:

- X-Ref Tests: Launches QC MRR Cross Reference Tests (Linked) form. The user can associate specific test results from the receiver with the MRR (page *223*).
- Disposition MRR Button: Launch QC Disposition MRR form for the current MRR (page *204*)

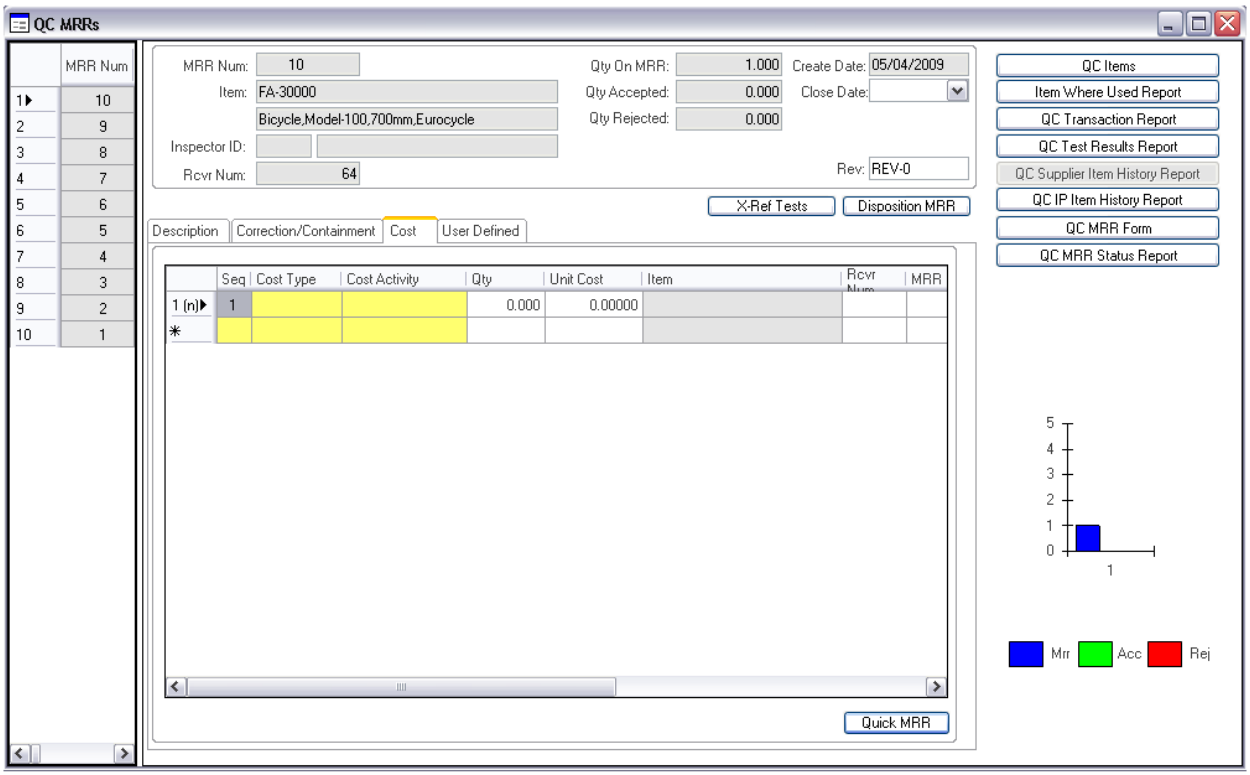


Correction/Containment Tab

- Correction/Containment: User defined (400 characters)
- Corrective Action: User defined (400 characters)
- CAR Num: Displays CAR number if there is one linked to this MRR, user can point this CAR to an existing CAR (if none already is set for this MRR)
- Rework Job: Can be set to an existing SyteLine job. Reference only
- Vendor RMA: Displays Vendor RMA number if there is one linked to this MRR
- Authorized by: If used, must be an employee number from SyteLine Employees

Buttons:

- XRef CAR: If a CAR is cross-referenced to this MRR, launch the QC CARs form. If no CAR is linked, create a CAR linked to this MRR. If a CAR is created, and parameters are set up to do so, an e-mail will be sent to the address(es) displayed in 'Notification' field.
- XRef VRMA: This button is not active for In Process related MRR's.



Cost Tab

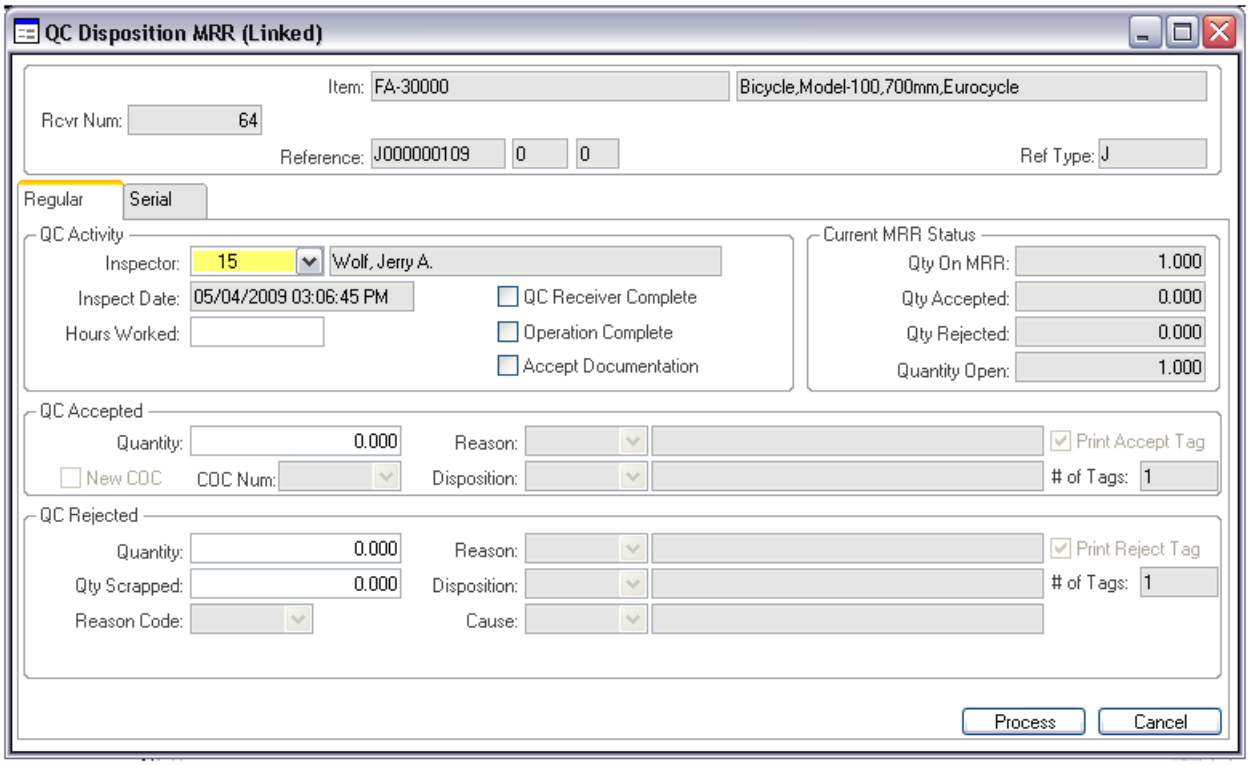
- Seq: System-generated
- Rcvr Num: If there is an existing QC Receiver related to this MRR, you may enter the number (not validated).
- MRR Num: If there is another MRR related to this MRR, you may enter the number (not validated).
- Item: If there is another item related to this MRR, you may enter it (not validated).
- Cost Activity: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece
- Problem Description: User defined
- Create Date: Set with the system date with this cost entry is created
- Description: User defined

Buttons:

- Quick MRR: Brings up the Quick Receiver/MRR Utility form (see QC Setup Manual)

Note:

1) **MRR costs are not linked with SL financials.**



QC Disposition MRR (Linked) (Disposition MRR button)

Field Descriptions:

Header

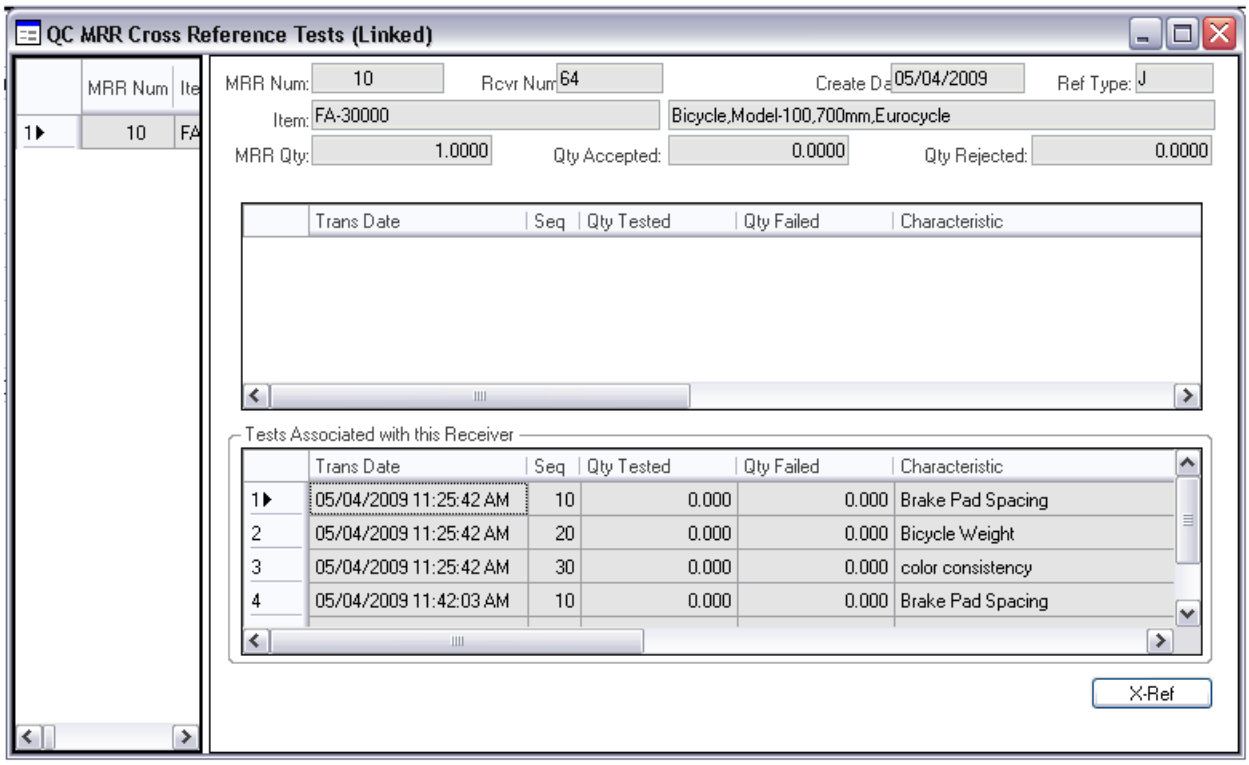
Displays the receiver number, Item number and description, Job/Suffix or PS ID, Operation, WC and WC Description

Test Results: If QC General Parameter 'Check for Test Results' is set to 'Alert-If Defined', a message will be displayed upon entering this form if there are test results defined for this QC Item. If 'Check for Test Results' is set to 'Required-If Defined' and there are test results defined for this QC Item, you will not be able to enter a disposition until/unless there are test results recorded for the receiver. If 'Check for Test Results' is set to 'Required-Always', you will not be able to enter a disposition until/unless there are test results recorded for the receiver.

Please see QC Regular Disposition for details (page *204*).

Differences: This form is only used to disposition from an MRR – you cannot put items on an MRR/On Hold from here (as they are already On Hold). Accepted/Rejected amounts will be applied to the Receiver associated with this MRR (and recorded against the MRR).

Xref Test Results to an MRR



QC MRR Cross Reference Tests (Linked) (Xref Tests button)

Field Descriptions:
Header

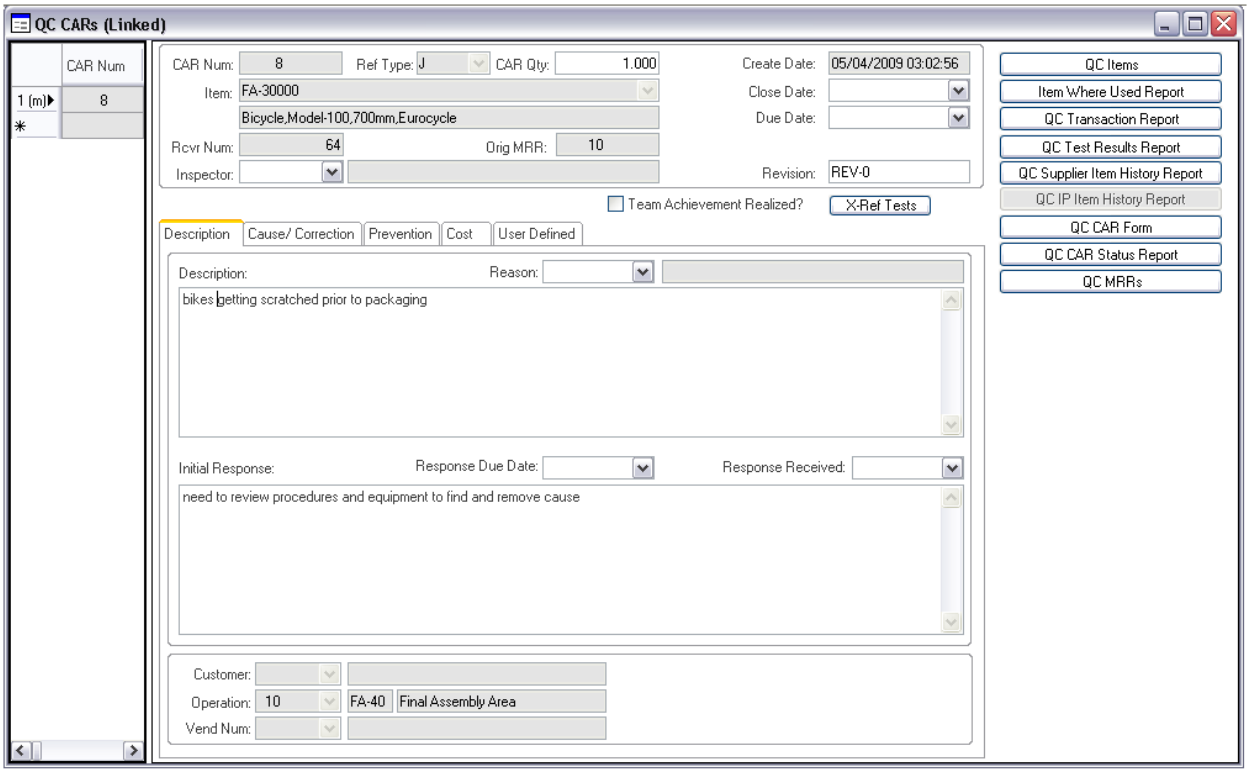
Displays detailed information from the MRR.

First browser shows tests associated with the MRR to date (e.g. if empty, no tests from the Receiver are associated with the MRR). In the above example, one test result line (for 05/04/2009 with 10 tested and 0 failed) has been associated with the MRR.

Tests Associated with this Receiver

- Displays all test results associated with the receiver linked to the MRR. To add the test result to the MRR, select the line in this browser, then click the <X-Ref> button. The test should now also display in the upper browser.

QC CARs



QC CARs

DESCRIPTION: Maintain CARs. A CAR can be created independent of QCS activity.

Field Descriptions:
Header

- CAR Num: System generated next available number
- Ref Type: P, J, R, or O
- CAR Qty: User defined
- Create Date: Displays the system date when the CAR was created
- Item/Description: Displays CARs Item number and its SyteLine description
- Close Date: User defined date to show when the CAR was closed

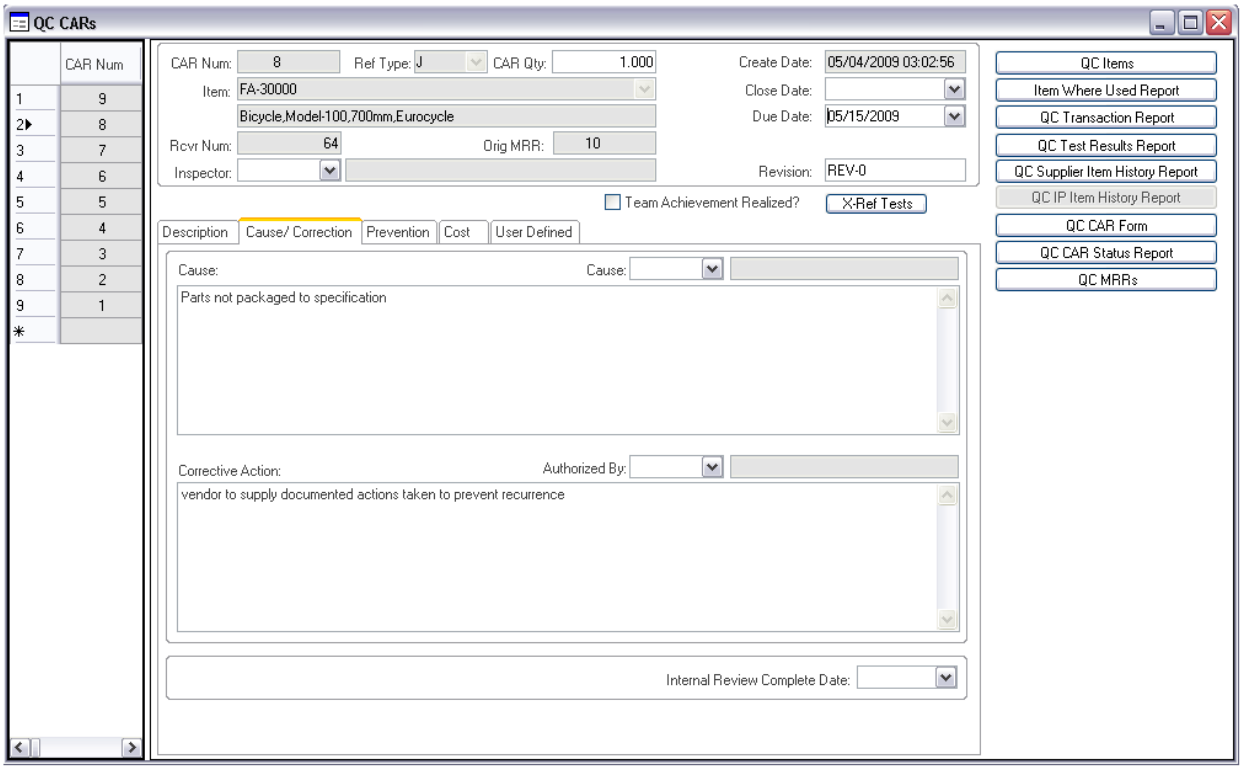
- Rcvr Num: If CAR was created from an MRR, displays receiver number linked to that MRR
- Orig MRR: If CAR was created from an MRR, displays related MRR number
- Internal Review Complete Date: User defined date field
- Inspector: User defined, validated against the SyteLine employee table. Name will display
- Team Achievement Realized?: User defined

Buttons:

- MRRs: Jump to MRR form for linked MRR
- X-Ref Tests: Assign test results (if a receiver is linked) to the CAR (works identical to Xref Test Results to an MRR description - see page *228*)

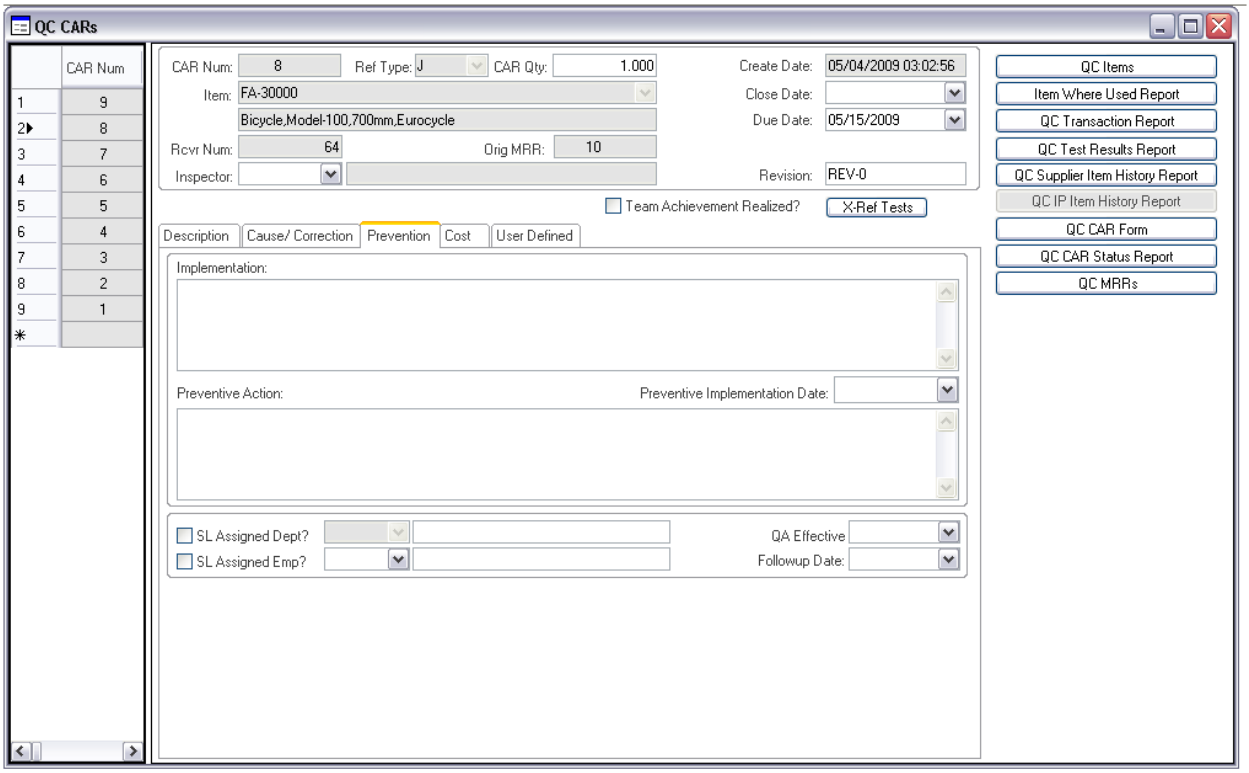
Description Tab

- Reason: Select a reason code validated from the QC Reason Codes Table
- Problem Description: User defined (400 characters)
- Response Due Date: User defined
- Response Received: User defined
- Initial Response: User defined (400 characters)
- Customer/Operation/Vendor: Displays information from Receiver, if applicable



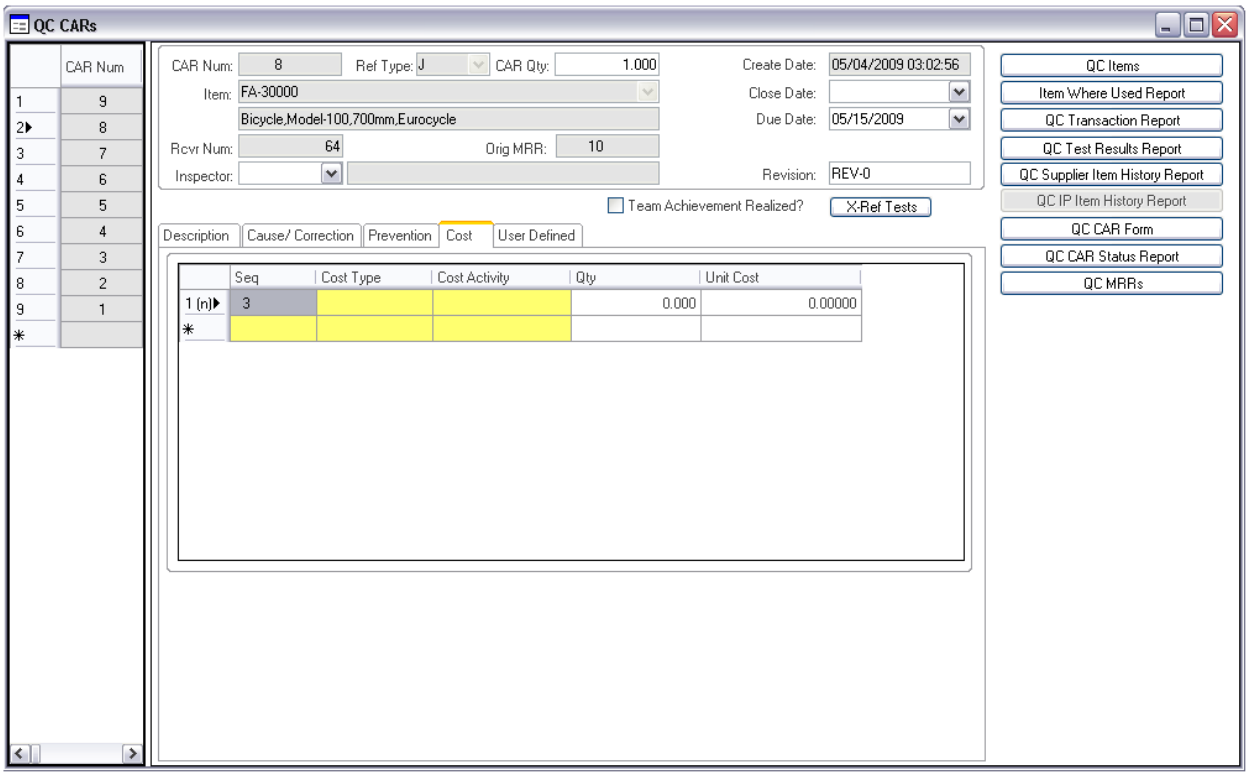
Cause/Correction Tab

- Cause: Select cause validated from QC Cause Codes table
- Cause of Defect: User defined (400 characters)
- Corrective Action: User defined (400 characters)
- Authorized By: If entered, validated again SyteLine employee table



Prevention Tab

- Implementation: User defined
- Preventive Implementation Date: User defined
- Preventive Action: User defined
- SL Assigned Dept?: If you wish to designate a SyteLine department for the CAR, check this box, enter the department ID in the next box (and its description will display); if not checked, a freeform entry can be entered in the dept description.
- SL Assigned Emp?: If you wish to designate a SyteLine employee for the CAR, check this box, enter the employee number in the next box (and the person's name will display); if not checked, a freeform entry can be entered in the employee name.
- QA Effective: User defined
- Follow up Date: User defined



Costs Tab

- Seq: System-generated
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Cost Activity: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece

Notes:

1) **Once a CAR is created it cannot be deleted.**
2) **An entry in 'Close Date' and 'Authorized By' closes a CAR. The CAR can be re-opened by removing the values from these fields.**
3) **CAR costs are not linked with SyteLine financials.**

QC In Process Reports

- **QC IP Yield Report:** Lists jobs, checkpoints, quantities, and calculated 'Yield' for that operation

- **QC IP Item History:** Lists jobs, dates, inspectors, for an item with Failure codes

- **QC IP Cost of Scrap:** Lists SyteLine Jobs with scrapped quantity and calculated material labor, and overhead value. This report is independent of QCS tracking

- **QC IP Action:** Listing of items awaiting some type of activity (disposition) from QC

- **QC IP Results Worksheet**: Provides a template for recording actual test/inspection results

- **QC IP Quality Plan:** Detailed description of the characteristics to be inspected/tested on a job

- **QC IP Job Paperwork**: Identifies operations for a job where the Quality department will perform a test

- **QC Outside Paperwork Report**: Provides paperwork for outside processing activities on a job

- **QC IP Cost of Quality**: Listing of cost activity for items linked to MRRs or CARs

- **QC Item Report**: Listing of tests, inspection criteria and notes for an item

- **QC Transaction Report**: A listing of QCS Transactions

- **QC Defect Distribution Report:** This report lists the failure codes and quantities that were entered against receivers

- **QC Test Results Report:** A list of test results that were entered against receivers. Can be displayed for summary or individual test data

- **QC MRR Form**: A printable document that includes related receiver and MRR information

- **QC MRR Status Report**: Summary of Material Review Reports

- **QC CAR Form:** A printable document that has Corrective Action information

- **CAR Status Report:** Summary of Corrective Action Requests

- **QC SPC Report:** This report calculates the Mean, Standard Deviation, C_p and C_{pk} for the last designated number of completed tests for an item.

QCS Customer Section

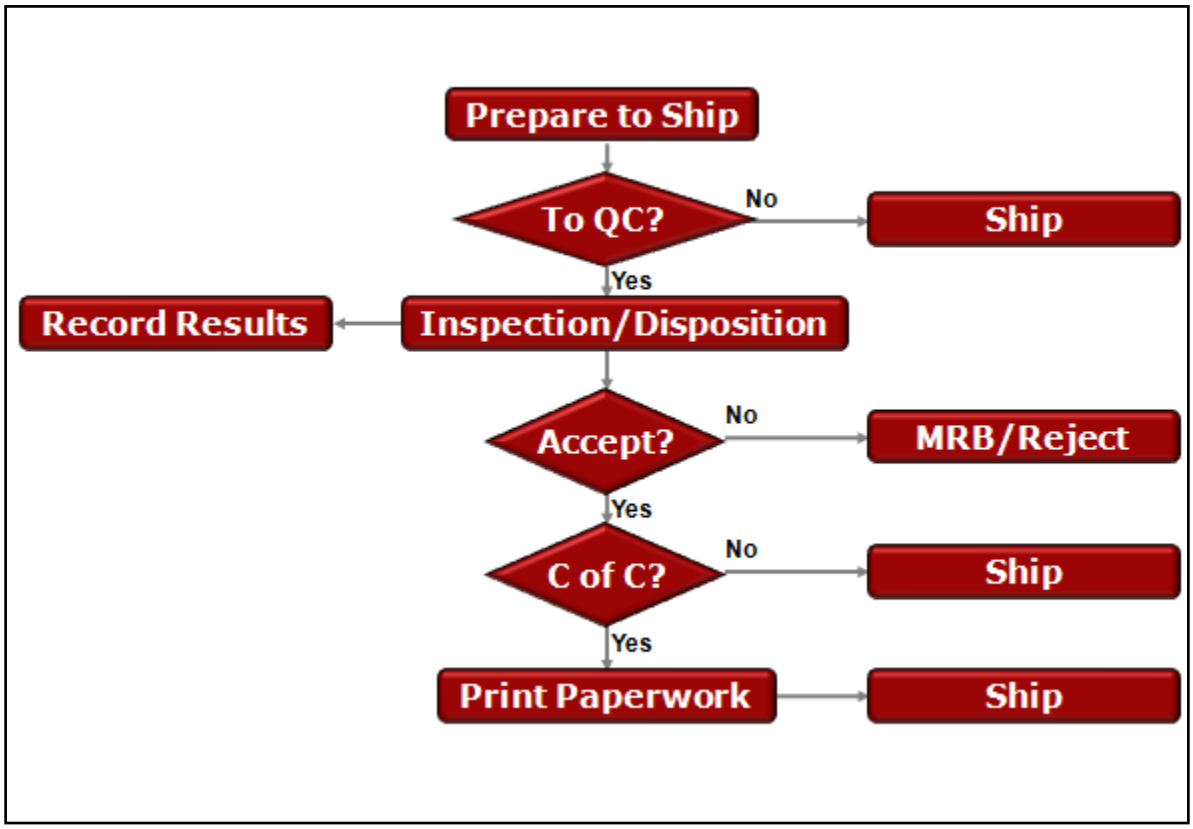
QCS Customer Overview

The Quality Control Solution (QCS) Customer module allows SyteLine users to identify and track Quality information to:

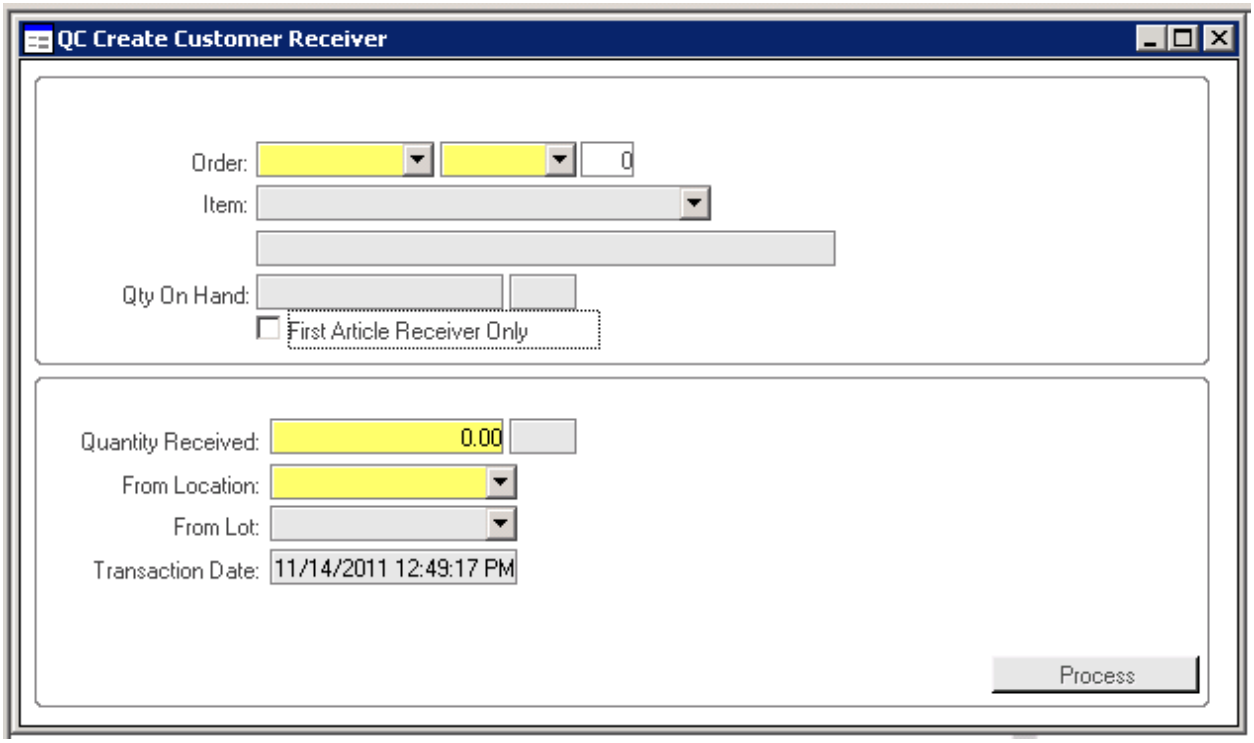
1. Identify, control and track product being shipped to customers, including certificate of conformance.
2. Identify and track product returned from customers (customer RMA)
3. Identify and track customer complaints.

All QCS access is via Infor SyteLine 9.00) for QCS 9.00. Standard forms, navigation, functionality and terminology from SyteLine are used.

The QCS Setup Section of this manual should be reviewed prior to learning the details for setting up and using the QCS Customer module. This manual introduces you to how the QCS Customer module works to assist you in tracking Quality information about your finished goods.


Prepare to Ship
To QC?
No
Ship
Yes
Record Results
Inspection/Disposition
Accept?
No
MRB/Reject
Yes
C of C?
No
Ship
Yes
Print Paperwork
Ship

- **Customer receivers for shipping can only be created manually. To do so, access the QC Create Customer Receiver form (see page *251*).**
- **Receiver can be created by: Customer Order (line/release) or by Item (based on settings in QC Customer Parameters)**



QC Create Customer Receiver

DESCRIPTION: Used to create a Supplier receiver for QC. If First Article receiver Only is checked then a receiver for First Article testing will be created. (See the following section)

Process Steps:

- Customer order and lines are created for QCS Items
- Manually create receiver for any order/line (see details on page *251*). When processed, the following will occur:
  - You will receive a notification that the receiver was created (and its number)

- Based on the QC Customer Parameter, and the QC Item settings, additional information will be displayed with the above.
- Based on QC Customer Parameters, if you have chosen to print tags, a receipt tag will print for the receiver created (Default for QC Customer Inspection Tags).
- Based on QC Customer Parameters, if you have chosen to see the QC Information Form – a form will pop up for the receiver created. From here, you can update the QC Lot and/or add notes to this receiver (Display QC Window when creating Receiver).

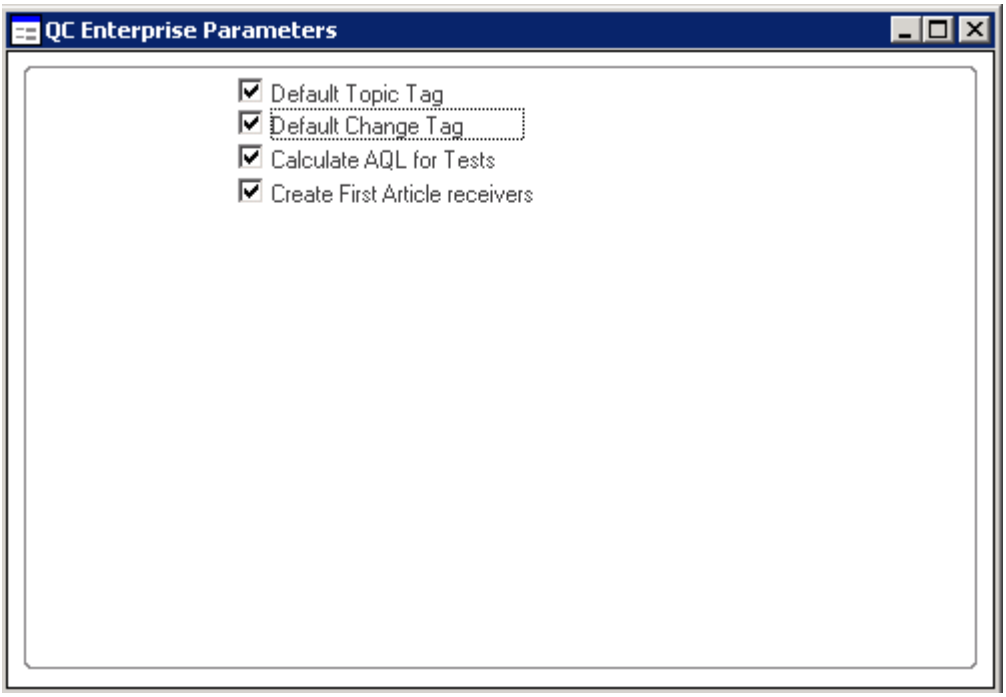
Create a Customer Receiver –With First Article Inspection

- **This is the same as Create a Customer Receiver except that it adds an additional receiver for the First Article Inspection.**

Using this method, a First Article receiver is created. A standard receiver can also be created for the same customer order. The second receiver (First Article) does not have any disposition associated with it and is only used for recording First Article Inspection data.

The following most be completed in order for a First Article Receiver to be created:

1. QCS Enterprise module must be installed and licensed in addition to the QCS Supplier Module
2. The Create First Article receivers option on the QC Enterprise Parameters for must be checked



3. For the specific QC Item – Customer Combination (or QC Item with blank cusotmer if applicable) the First Article box must be checked on the QC Items form in the Item/Inspection tab

NOTE: If only the First Article on the QC Item is checked and not the parameter than an alert will pop up but no first article receiver will be created.

You will note:

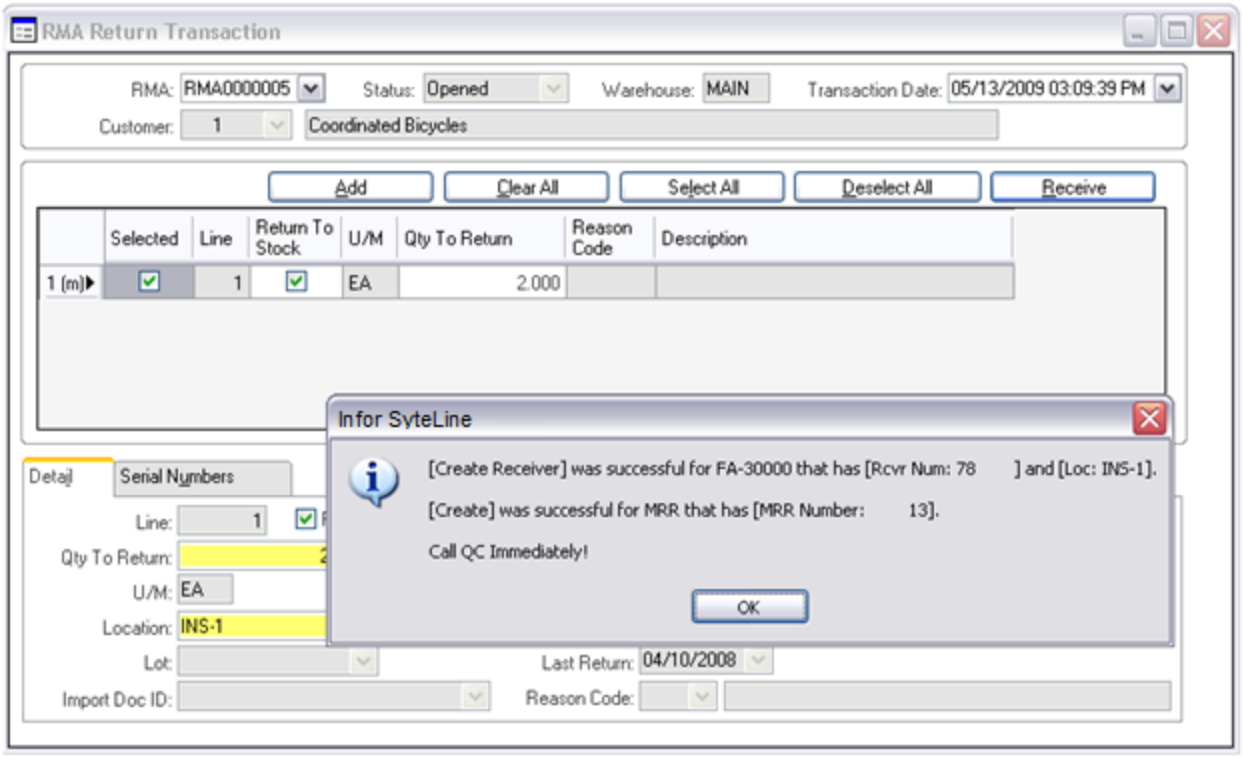
- The First Article Receiver is for a quantity of one
- The Standard Receiver is for the receipt quantity
- The First Article Receiver only allows for the Recording of Defects. You cannot disposition this receiver.

If you require a second first article receiver (you can create as many as you want) then you would use the Create Manual Customer Receiver an additional time.

Create a Customer Receiver (RMA) – RMA Return Transaction

- **Set up QCS Customer parameters to automatically create receivers when items are returned via RMA Return Transactions (please see the QCS Setup Section of this manual). Also check whether or not you wish these receivers to automatically be put 'on hold' and have an MRR created (as shown in the example below).**

- **Receive the items into RMA (if set up, the items will be received into a special QCS location).**

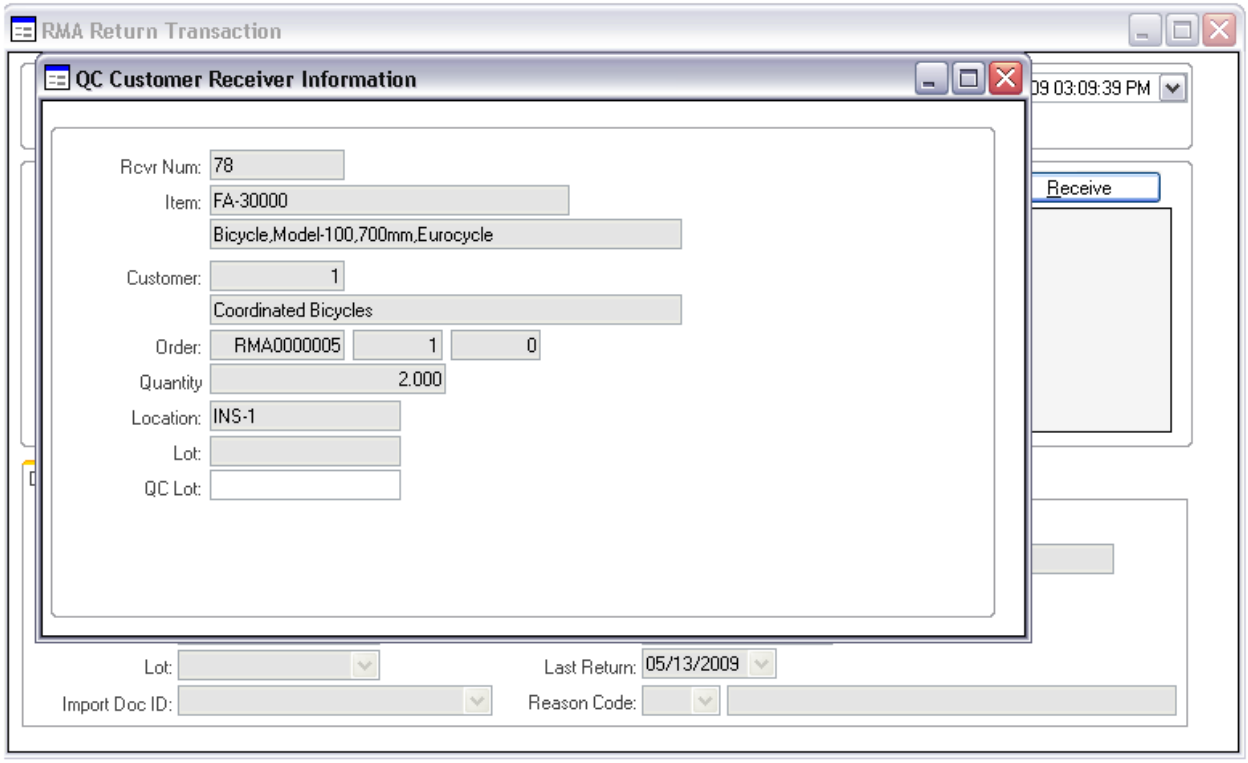


Process Steps:

- Material is returned to your company
- SyteLine user receives into RMA Return Transaction
- If your QC Customer Parameter (Auto Create RMA Receivers) is checked, the following will occur:
    - You will receive a notification that the receiver was created (and its number).
    - If set up to automatically put on hold (Create MRRs at RMA Return checked), all the quantity received will be put on hold, and an MRR will be created.

- Based on the QC Customer Parameter, and the QC Item settings, additional information will be displayed with the above.
- Based on QC Customer Parameters, if you have chosen to print tags, a receipt tag will print for the receiver created (Default For RMA Tags).
- Based on QC Customer Parameters, if you have chosen to see the QC Information Form – a form will pop up for the receiver created. From here, you can update the QC Lot and/or add notes to this receiver (QC Window when creating Receiver)

Below is a sample of the QC Customer Receiver Information form that displays (based on QC Customer Parameters settings)

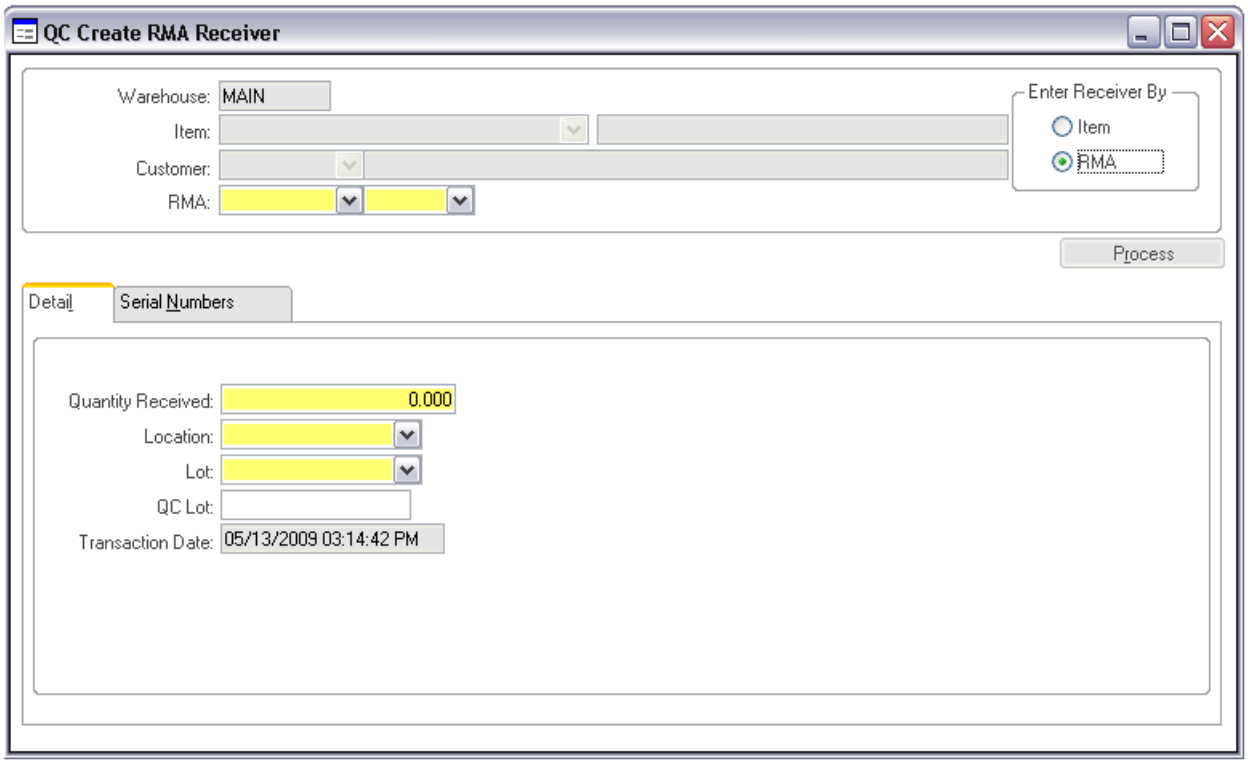


As noted previously, only two areas can be altered with this form, a QC Lot can be set or updated, and notes can be added to the receiver using the 'Notes' icon in the toolbar.

Create a Customer Receiver (RMA) – Manual

- **This method can be used in place of the 'RMA Return Transaction' method, or as an option for moving parts into QCS outside of the RMA Return Transaction process flow.**

- **Receiver can be created by:**
    - **RMA/Line**
    - **Item/Customer**
    - **Item only**
    - **Note that no inventory transaction occurs when the receiver is created.**



Process Steps:

- Material is returned to your company
- SyteLine user receives material using a standard SyteLine form
- Use QC Create RMA Receiver (see page *251*). When processed, the following will occur:
    - You will receive a notification that the receiver was created (and its number).
    - Based on the QC Customer Parameter, and the QC Item settings, additional information will be displayed with the above.

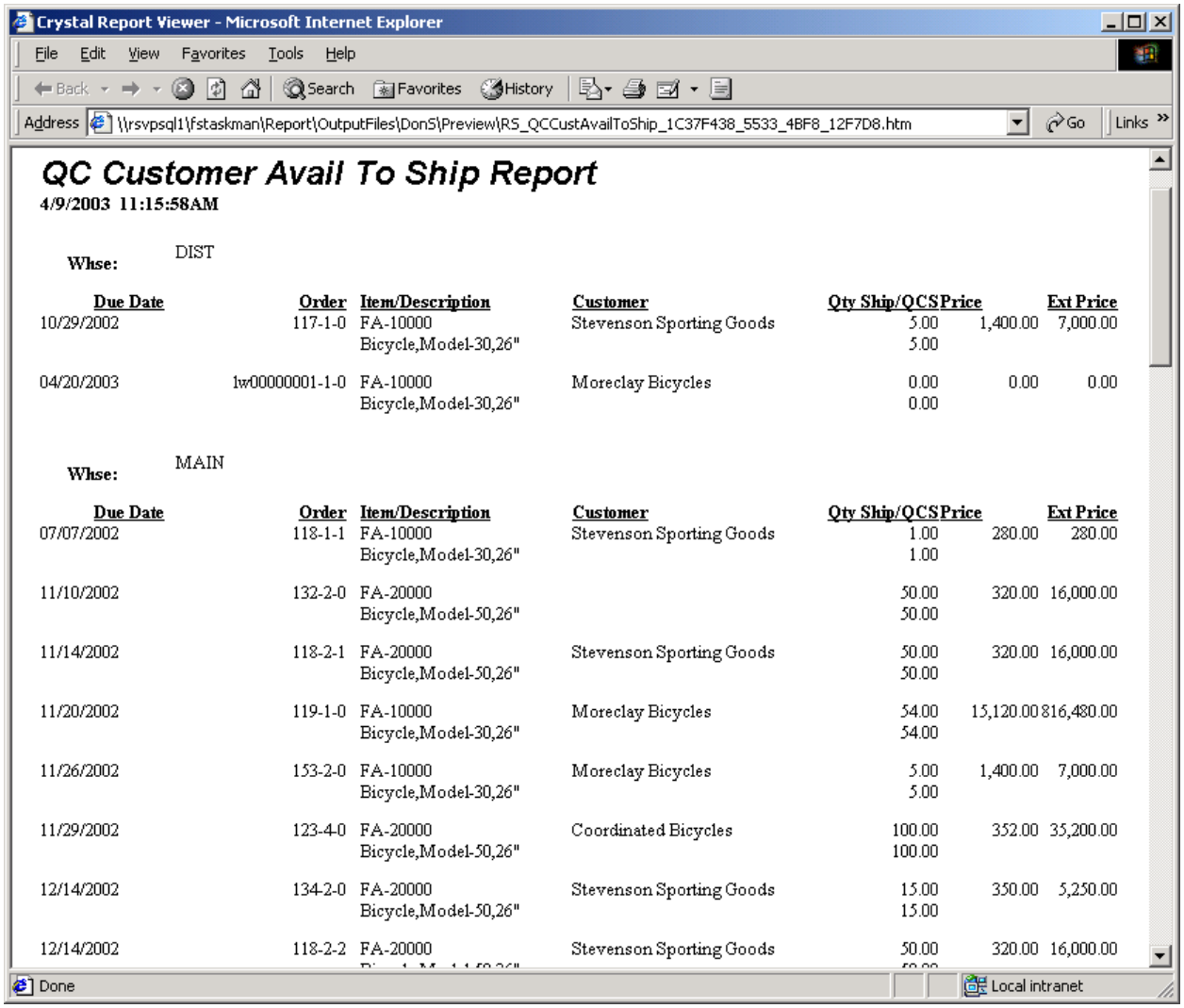
- Based on QC Customer Parameters, if you have chosen to print tags, a receipt tag will print for the receiver created (Default For RMA Tags).
- Based on QC Customer Parameters, if you have chosen to see the QC Information Form – a form will pop up for the receiver created. From here, you can update the QC Lot and/or add notes to this receiver (QC Window when creating Receiver).

Identifying Receipts Waiting for Disposition

There are several methods you can use to check on the work waiting in the QCS queue. Any one or a combination of these methods can help you schedule activity in the Quality Assurance area.

- **Preview/Print the QC Customer Avail to Ship Report**
- **Access the QC Customer (or RMA) Inspect/Disposition form**
- **Access the QC Customer (or RMA) Inspect/Disposition form**

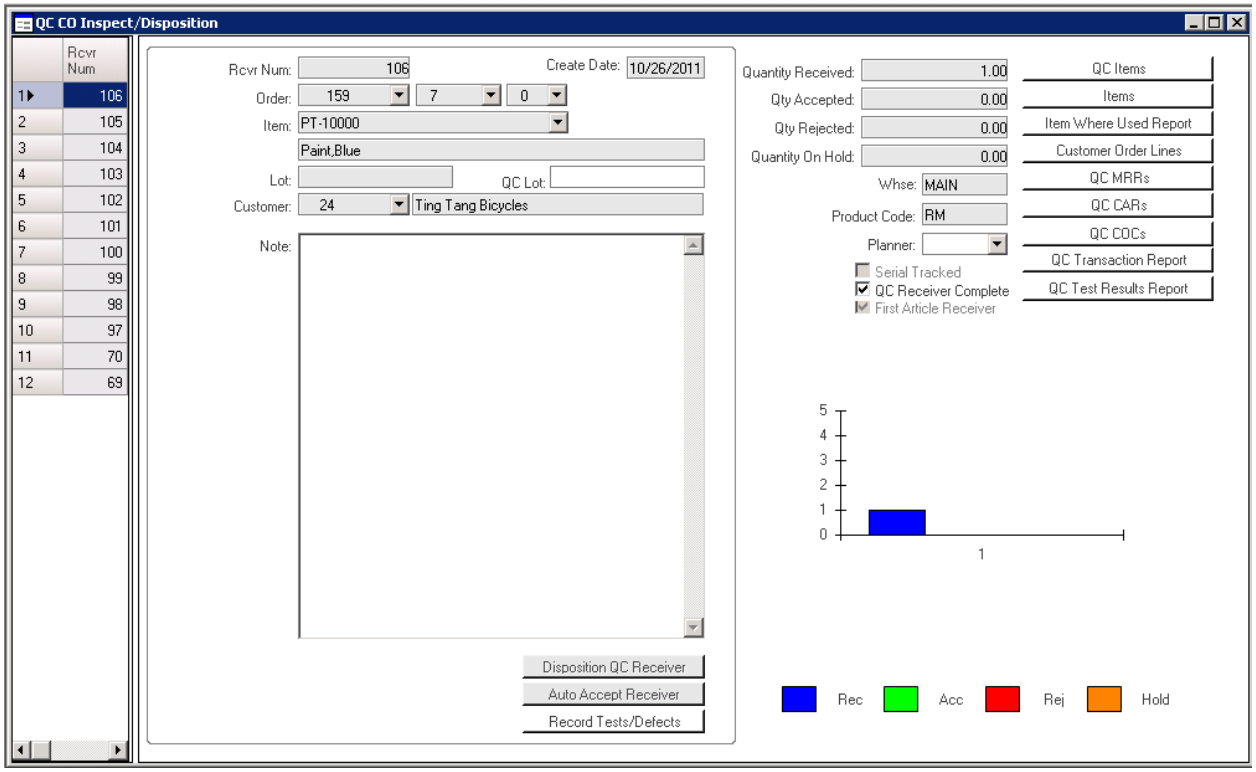
QC Customer Available to Ship Report



Fields

- Whse: Warehouse location
- Due Date: Due Date from the Customer Order
- Order/Line/ Release: Customer Order, Line, and Release number from the Customer Order
- Item/Description: Item & Description from the Customer Order
- Customer: Customer from the Customer Order
- Qty to Ship/QCS: CO quantity/QCS Accepted quantity
- U/M: Unit of Measure
- Unit Price: Unit Price from the Item Maintenance screen
- Ext Price: Qty Ship * Unit Price

Inspect/Disposition Lookup



QC CO Inspect/Disposition

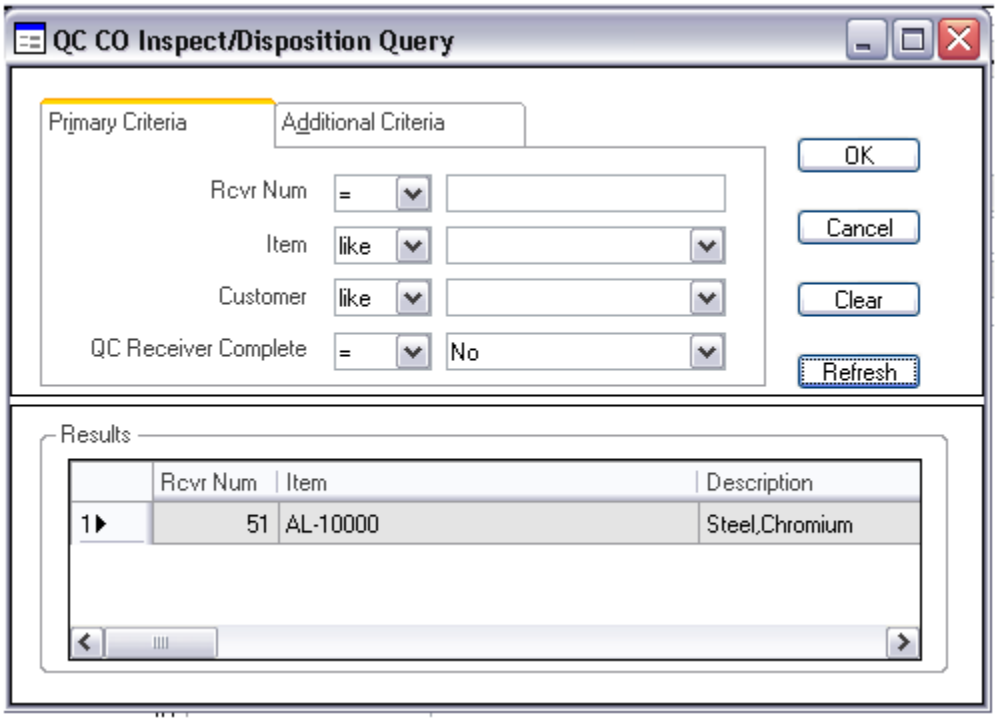
DESCRIPTION: This form is used to select a receiver to disposition and/or to record test results against that receiver.

- As with any SyteLine form, the number of receivers that show is based on your 'maximum retrieval' setting.
- By default, the receivers will display in reverse order by receiver number.
- By default, all receivers will be displayed.
- The form will open in 'Filter' mode – you may fine-tune your query by any of the available fields to get a specific picture of the work in (or already completed from) the Quality department.

Note:

1) **The QC RMA Inspect/Disposition Query form can also be reviewed.**

Inspect/Disposition Query Lookup



QC CO Inspect/Disposition Query

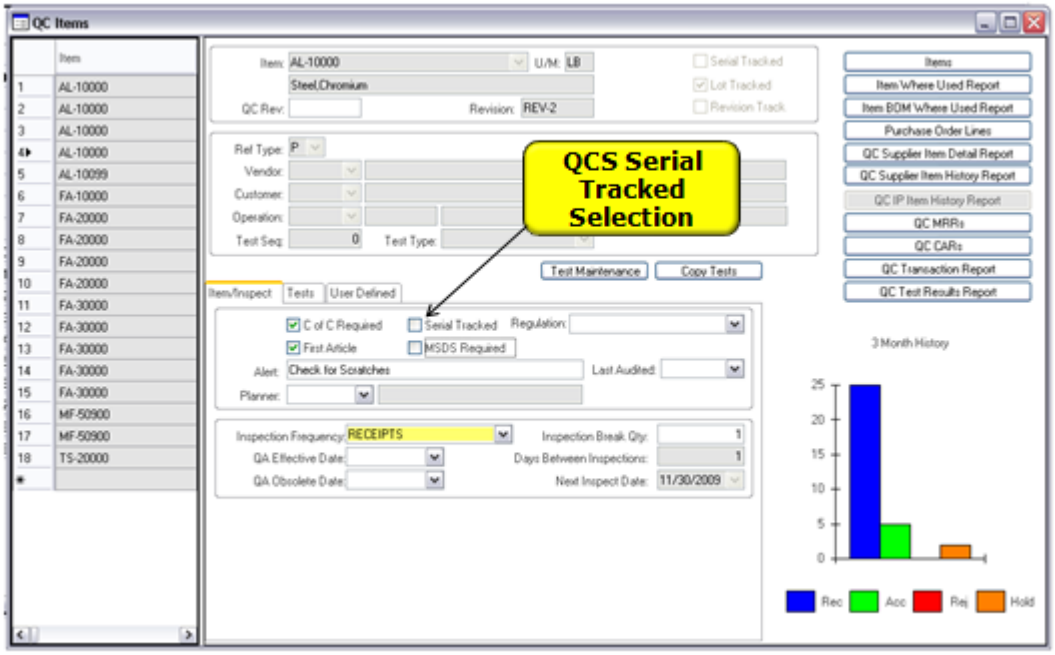
DESCRIPTION: This form allows the user to define a query for QCS Customer Receivers. When configured as shown, the query displays all open Customer (shipping) receivers. Use standard SyteLine query functionality to fine-tune your query.

Note:

1) **The QC RMA Inspect/Disposition Query form can also be reviewed.**

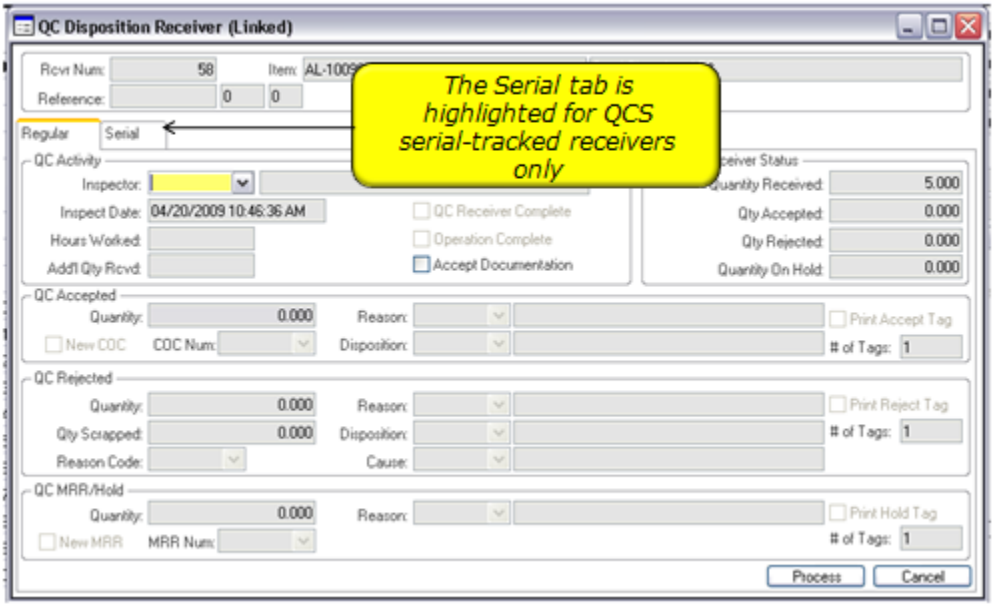
The QCS product allows you to track serial numbers that are internal to QCS only (e.g. not SyteLine serial numbers). This allows test results and dispositioning information to be stored by a specific item/serial number – but without the need to track serial numbers for this item throughout SyteLine.

An item can be set up for QCS Serial tracking using the QC Items form:



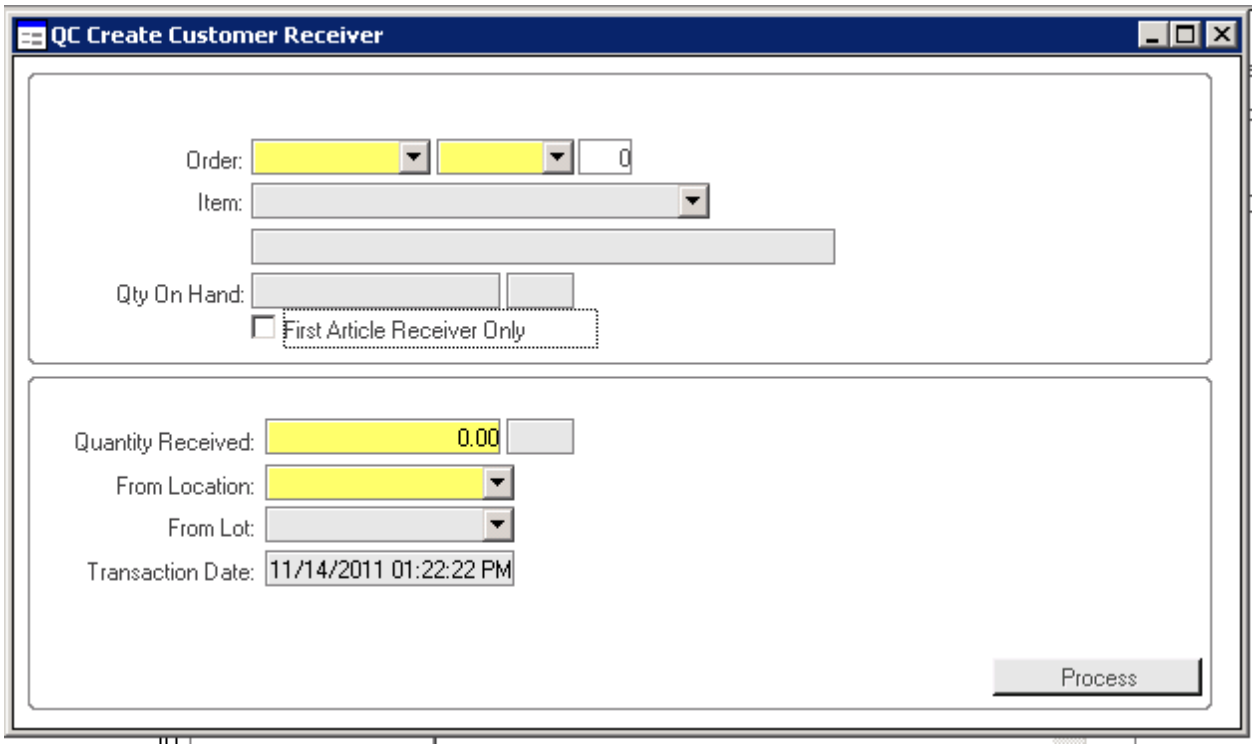
Once a QCS item is set up with the 'Serial Tracked' field selected, any receivers created from that point on will require that QCS Serial Numbers be created to record disposition or test results. Please note that QCS serial numbers are not associated with SL serial numbers.

Below is a sample of the QC Disposition Receiver form, as it will look for a receiver that is marked for QCS Serial Tracking:



The user will have access to the Serial tab only for receivers marked for QCS Serial tracking. Details about how to use this tab are found in the QC Disposition Receiver section, starting on page *258.*

QC Create Customer Receiver



QC Create Customer Receiver

DESCRIPTION: Create a Customer Receiver (either by Item or by Customer Order based on QC Customer Parameter setting). The user may decide to either move CO Items to be inspected to a QC location or leave the item where it was last located (in which case, use the same location for 'From' and 'To' location). If First Article receiver Only is checked, then a receiver for First Article testing will be created. (See the following section)

Field Descriptions:

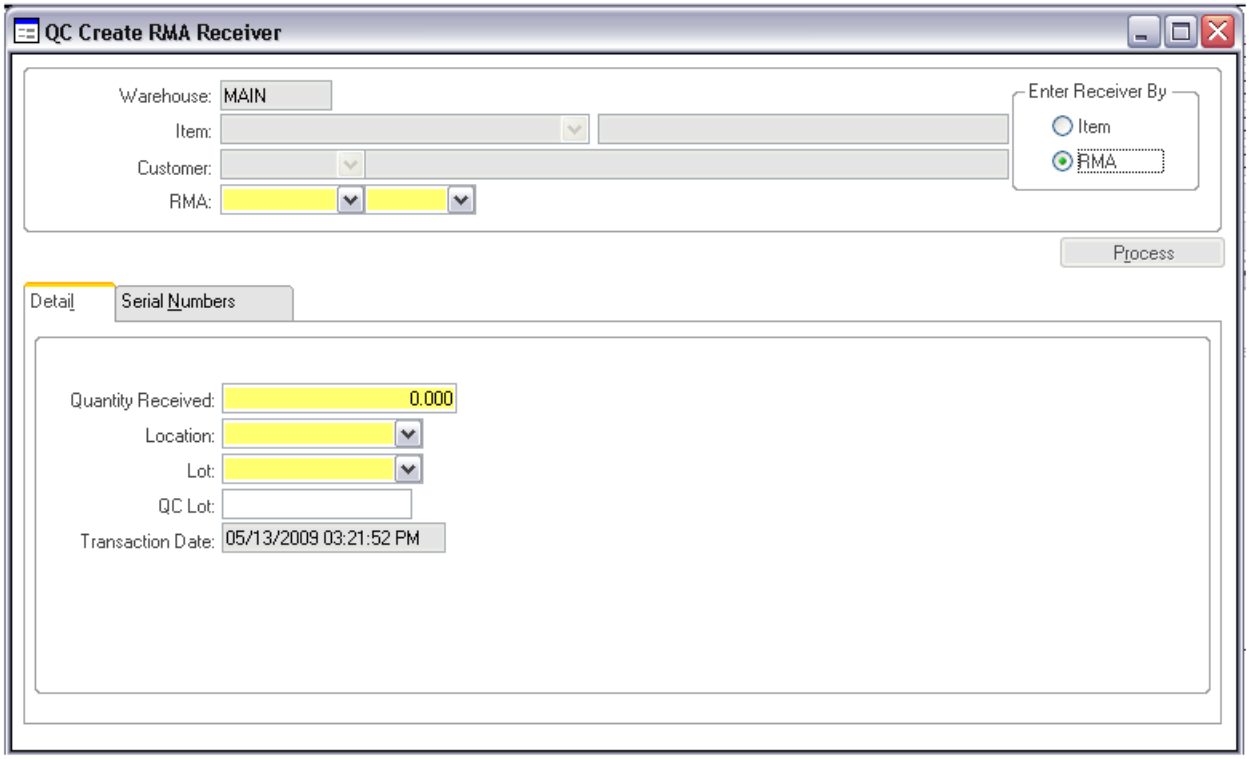
- Order: Enter Customer Order/Line/Release (accessible based on QC Customer Parameters)
- Item: Enter valid QCS Customer Item, (Accessible based on QC Customer Parameters). The SyteLine Item description displays.
- Qty On Hand: Displays for item (also Unit of Measure)
- Quantity Received: Enter QCS Receiver Quantity
- From Location: Must be a valid SyteLine location for this item

- From Lot: Accessible, required, validated if item is lot-tracked within SyteLine
- To Location: Must be a valid SyteLine location
- To Lot: Displays the 'From Lot' if required
- Transaction Date: Displays system date and time

Notes:

1) **Any alerts set up for this QC Item will display, with the ID of the new receiver.**
2) **Based on the QC Customer Parameter, and the QC Item settings, additional information will be displayed with the above.**
3) **Based on QC Customer Parameters, if you have chosen to print tags, a receipt tag will print for the receiver created (Default for QC Customer Inspection Tags).**
4) **Based on QC Customer Parameters, if you have chosen to see the QC Information Form – a form will pop up for the receiver created. From here, you can update the QC Lot and/or add notes to this receiver (Display QC Window when creating Receiver).**

QC Create RMA Receiver



QC Create RMA Receiver

DESCRIPTION: Allows user to manually create an RMA receiver for QC.

Field Descriptions:
Header

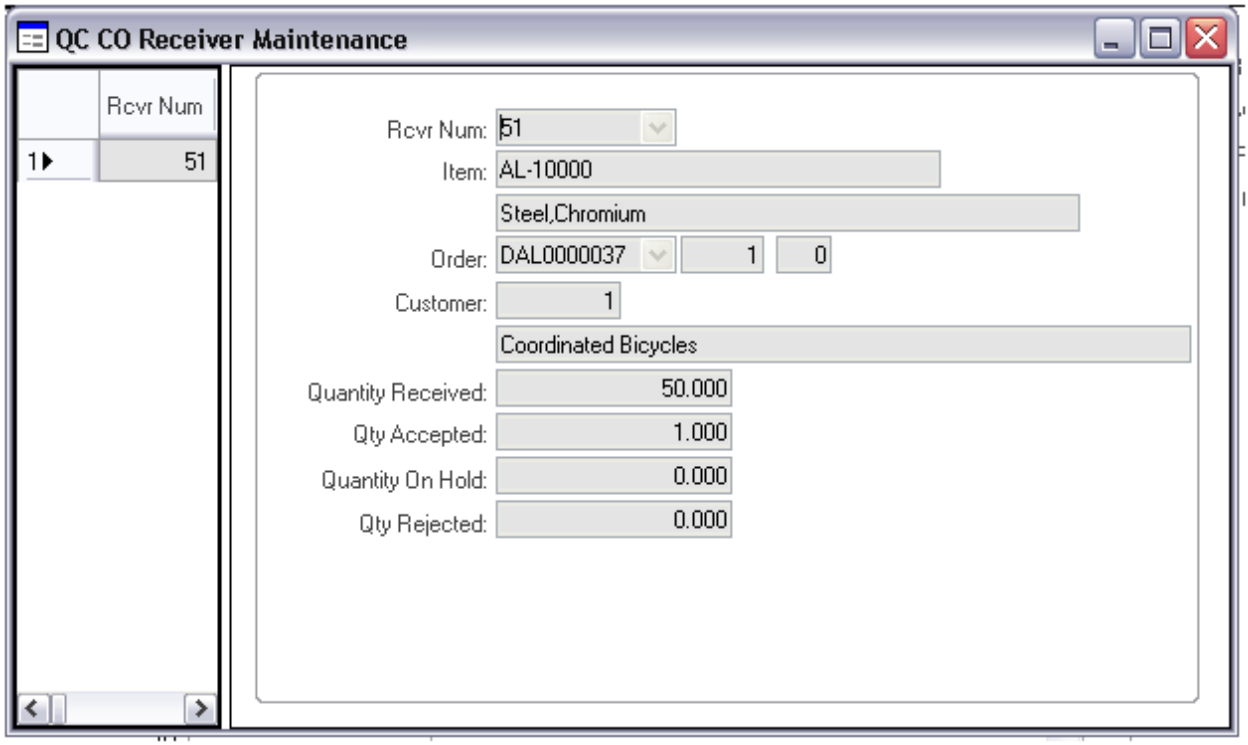
- Enter Receiver By: Select Item or RMA radio button, default is Item
- Warehouse: Displays current SyteLine warehouse
- Item: Accessible when 'Enter Receiver By: Item' is selected. Must be a valid QCS RMA Item. The SyteLine Item description displays
- Customer: Accessible when 'Enter Receiver By: Item' is selected. Optional. If entered, must be a valid SyteLine customer. Customer name displays
- RMA/Line: Accessible when 'Enter Receiver By: RMA' is selected. Must be a valid SyteLine RMA/Line, and must be for a QCS RMA Item

Detail Tab

- Quantity Received: Enter QCS Receiver Quantity
- Location: Must be a valid SyteLine location for this item
- Lot: Accessible, required, validated if item is lot-tracked within SyteLine
- QC Lot: User defined
- Transaction Date: Displays system date and time

All activity for forms, tags, etc. will be performed as described on page *242*.

QC CO Receiver Maintenance



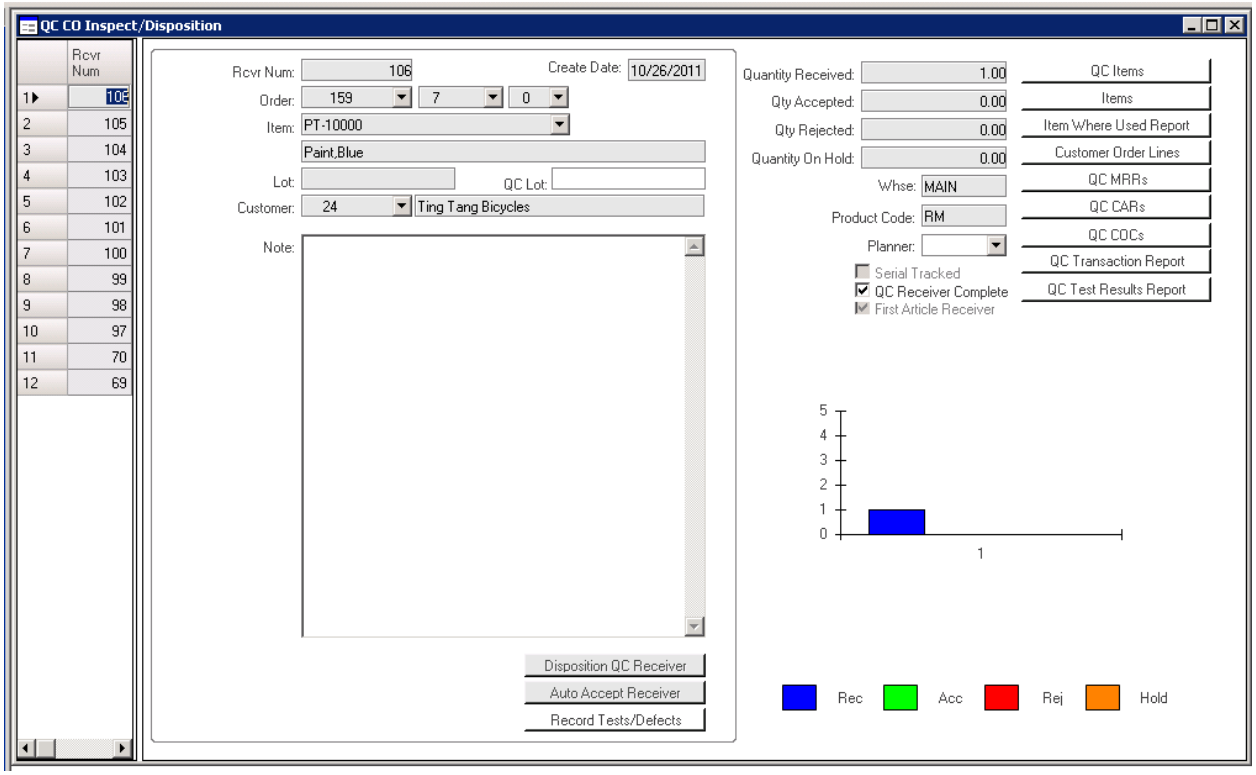
QC CO Receiver Maintenance

DESCRIPTION: Allows user to add receiver-level notes, or to change the Customer Order/Line/Release for this receiver.

Record Receiver Disposition and Test Results

To record the disposition of a receiver, or to enter test results, the user will access the QC Customer (or RMA) Inspect/Disposition Form. From here, specific receivers can be found, their status and quantities checked. Once the desired receiver is found, the user can then access the form to either disposition or record test results against that receiver.

QC CO Inspect/Disposition



QC CO Inspect/Disposition

DESCRIPTION: Displays (filtered) list of CO Receivers, (allows access to dispositioning or entry of test results/defects).

Buttons:

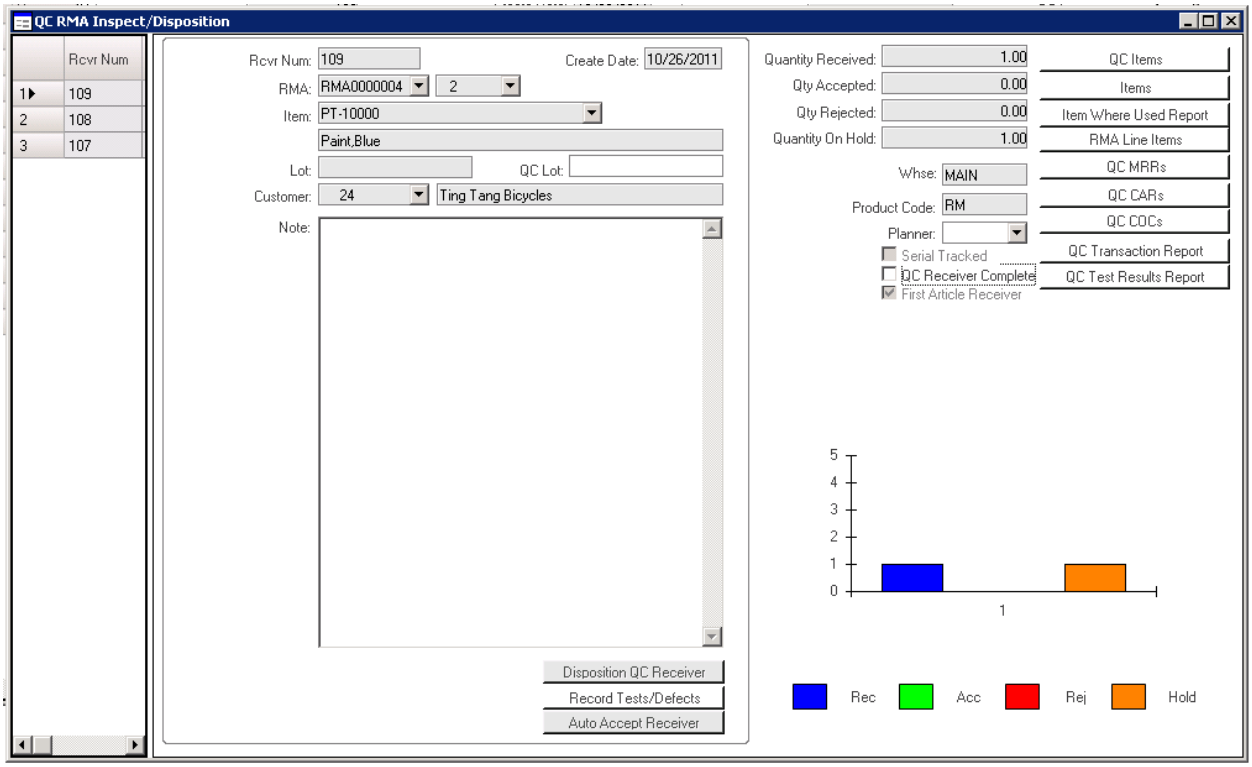
- Disposition QC Receiver: Takes user to QC Disposition form (page *258*) for the current receiver
- Record Tests/Defects: Takes user to Test Result Entry (page *265*) for the current receiver. Only enabled if the current receiver's item has current tests defined.

Notes:

1) **If an MRR has been created for a receiver, the MRR is dispositioned from a different form. Please access the QC MRRs form (page *278*).**

2) **If Inspection/Tests have been created for the item, the 'Record Tests/Defects button will be highlighted (as shown above). If no tests are set up, the button will be disabled.**

QC RMA Inspect/Disposition



QC RMA Inspect/Disposition

DESCRIPTION: Displays (filtered) list of RMA Receivers. Allows access to dispositioning or entry of test results/defects.

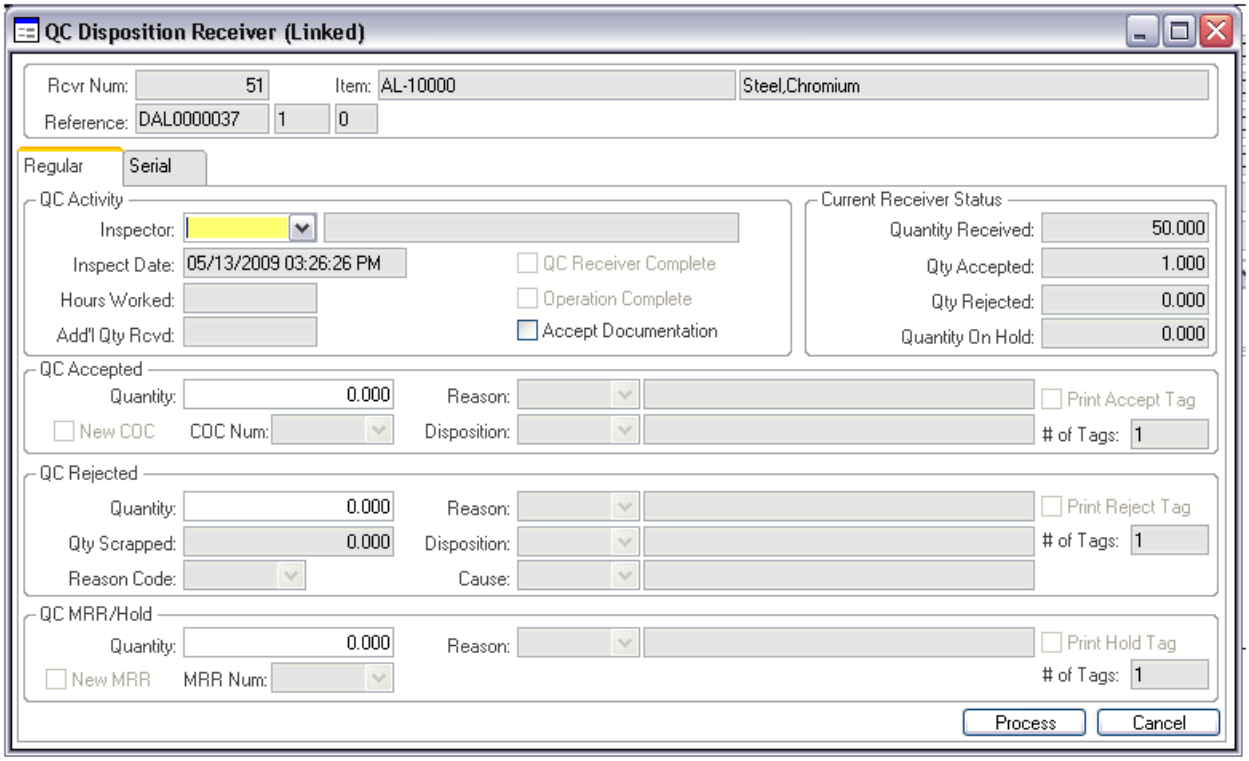
Buttons:

- Disposition QC Receiver: Takes user to QC Disposition form (page *258*) for the current receiver
- Record Tests/Defects: Takes user to Test Result Entry (page *265*) for the current receiver. Only enabled if the current receiver's item has current tests defined.

Notes:

1) **If an MRR has been created for a receiver, the MRR is dispositioned from a different form. Please access the QC MRRs form (page *278*)**
2) **If Inspection/Tests have been created for the item, the 'Record Tests/Defects button will be highlighted (as shown above). If no tests are set up, the button will be disabled.**
3) **If the Supplier Inspect/Disposition form is a First Article receiver only, the Record tests/Defects will be enabled.**

QC Disposition Receiver



QC Disposition Receiver (Linked)

DESCRIPTION: This form is used to enter the disposition for items in QCS for a selected Receiver. This form should only be accessed from the QC Inspect/Disposition forms.

Field Descriptions:

Header

Displays the receiver number, Item number and description, Job/Suffix or PS ID, Operation, WC and WC Description

Message: If QC General Parameter 'Check for Test Results' is set to 'Alert-If Defined', a message will be displayed upon entering this form if there are test results defined for this QC Item. If 'Check for Test Results' is set to 'Required-If Defined' and there are test results defined for this QC Item, you will not be able to enter a disposition until/unless there is at least one test result recorded for the receiver. If 'Check for Test Results' is set to 'Required-Always', you will not be able to enter a disposition until/unless there are test results recorded for this receiver.

Regular Tab

QC Activity

- Inspector: If QC General Parameter 'Inspector Validation' is set to 'None', no inspector number is required. If the parameter is set to 'Employee', you must enter a valid employee number. The employee name will display. This field can auto populate depending on the settings on QC General Parameters
- Inspect Date: Defaults to and displays the system date/time
- Add'l Qty Rcvd: Enter the quantity for any new material moved into this receiver
- QC Receiver Complete: Manually check box when the receiver is completed
- Accept Documentation: User defined

Current Receiver Status

- Quantity Received: Displays the quantity received into QC for this receiver
- Quantity Accepted: Displays the quantity accepted to date
- Quantity Rejected: Displays the quantity rejected to date

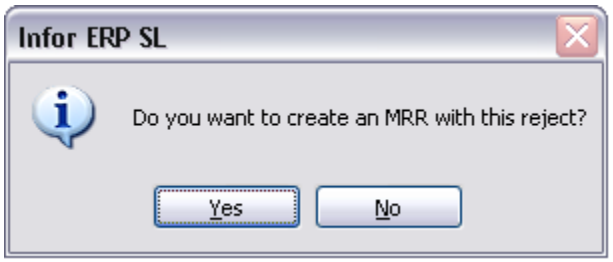
- Quantity On Hold: Displays the quantity on hold to date

QC Accepted

- Quantity: Enter the quantity to accept for this transaction
- Reason: If the QC General Parameter 'Prompt For Reason On Accept' is checked, and a non-zero QC Accepted quantity is entered, enter a valid QC Reason; its description will display. If 'Prompt for Reason on Accept' is not checked, the system will default to and display the first Reason for IP/Accepted, and it cannot be changed
- Disposition: If a non-zero QC Accepted quantity is entered, enter a valid Disposition; its description will display
- Print Accept Tags: If a non-zero QC Accepted quantity is entered, check box if you wish to print 'Accept' tags for this transaction, uncheck box if you do NOT wish 'Accept' tags for this transaction. Value defaults from QC IP Parameter 'Default for IP Inspection Tags'
- # of Tag: If a non-zero QC Accepted quantity is entered, and Print Accept Tag is checked, enter the number of 'Accept' tags to be printed for this transaction. Defaults to 1
- New COC: If a non-zero accepted quantity is entered, either a new COC must be created for the COC quantity, or the quantity must be added to the existing COC for this receiver. If you want to create a new COC, this box must be checked. If not checked, COC Num must be valid. Defaults to checked
- COC Num: Select an existing COC for this receiver. Current quantity accepted will be added to that COC. If there are no exisiting COC's for this receiver, New COC must be checked

QC Rejected

- Quantity: Enter the quantity to reject for this transaction. If the value in QC Customer Parameter 'Create MRR for Reject' is set to 'Prompt' – a message box will appear asking if you want the reject quantity to create an MRR:



If so, the quantity will be moved to QC Hold and processed as such (see below). If the QC IP Parameter 'Create MRR for Reject' is set to 'Always' – the quantity will ALWAYS be moved to QC Hold and processed as such (see below). If set to 'Never': the quantity will stay in the QC Rejected area.

- Qty Scrapped: If create a Job Transaction with this disposition, this value will be moved to the 'Qty Scrapped' (regardless of disposition quantities). If greater than zero, a Reason Code is required.

- Reason Code: If Qty Scrapped is greater than zero, enter the SyteLine reason code.

- Reason: If the QC General Parameter 'Prompt for Reason on Reject' is checked, and a non-zero QC Rejected quantity is entered, enter a valid QC Reason; its description will display. If 'Prompt For Reason on Reject' is not checked, the system will default to and display the first Reason for IP/Rejected, and it cannot be changed.

- Disposition: If a non-zero QC Rejected quantity is entered, enter a valid Disposition; its description will display.

- Cause: If a non-zero QC Rejected quantity is entered, optionally enter a valid Cause; its description will display.

- Print Reject Tag: If a non-zero QC Rejected quantity is entered, check box if you wish to print 'Reject' tags for this transaction, uncheck box if you do NOT wish 'Reject' tags for this transaction. Value defaults from QC IP Parameter 'Default for QC IP Inspection Tags'

- # of Tags: If a non-zero QC Rejected quantity is entered, and Print Reject Tag is checked, enter the number of 'Reject' tags to be printed for this transaction. Defaults to 1

QC MRR/On Hold

- Quantity: Enter the quantity to put on hold for this transaction

- Reason: If the QC MRR/On Hold Quantity is non-zero, enter a reason code for Supplier/QCHOLD

- Print Hold Tag: If a non-zero QC MRR/On Hold quantity is entered, check box if you wish to print 'QCHOLD' tags for this transaction, uncheck box if you do NOT wish 'QCHOLD' tags for this transaction. Value default from QC Supplier Parameter 'Default for QC IP Inspection Tags'
- # of Tags: If a non-zero QC MRR/On Hold quantity is entered, and Print Hold Tag is checked, enter the number of 'QCHOLD' tags to be printed for this transaction. Defaults 1
- New MRR: If a non-zero QC MRR/On Hold quantity is entered, either a new MRR must be created for the MRR quantity, or the quantity must be added to an existing MRR for this receiver. If you want to create a new MRR, this box should be checked. If not checked, MRR Num must have a valid MRR number. Defaults to checked
- MRR Num: Select an existing MRR for this receiver. Current quantity MRR/On Hold will be added to that MRR. If there are no existing MRRs for this receiver, New MRR must be checked.

Button:

- Process: Disposition Accepted/Rejected/MRR for the receiver. A 'Disposition Completed' message will display when processing is done. If an MRR was created as a result of this transaction, and you are set up to send e-mails using the event system:
  - If you are set to prompt for e-mail, you will receive a prompt, if yes (or if you are coded to Always send the e-mail) the e-mail will be constructed and sent to the E-mail Address value that is in the event system forms. This utilizes the event system so it is dependent on your configuration of standard SyteLine events.
  - If you do not have the parameters to prompt or send an email then no email will be sent.
- Also, if an MRR was created as a result of this transaction, the message will additionally show the new MRR number:

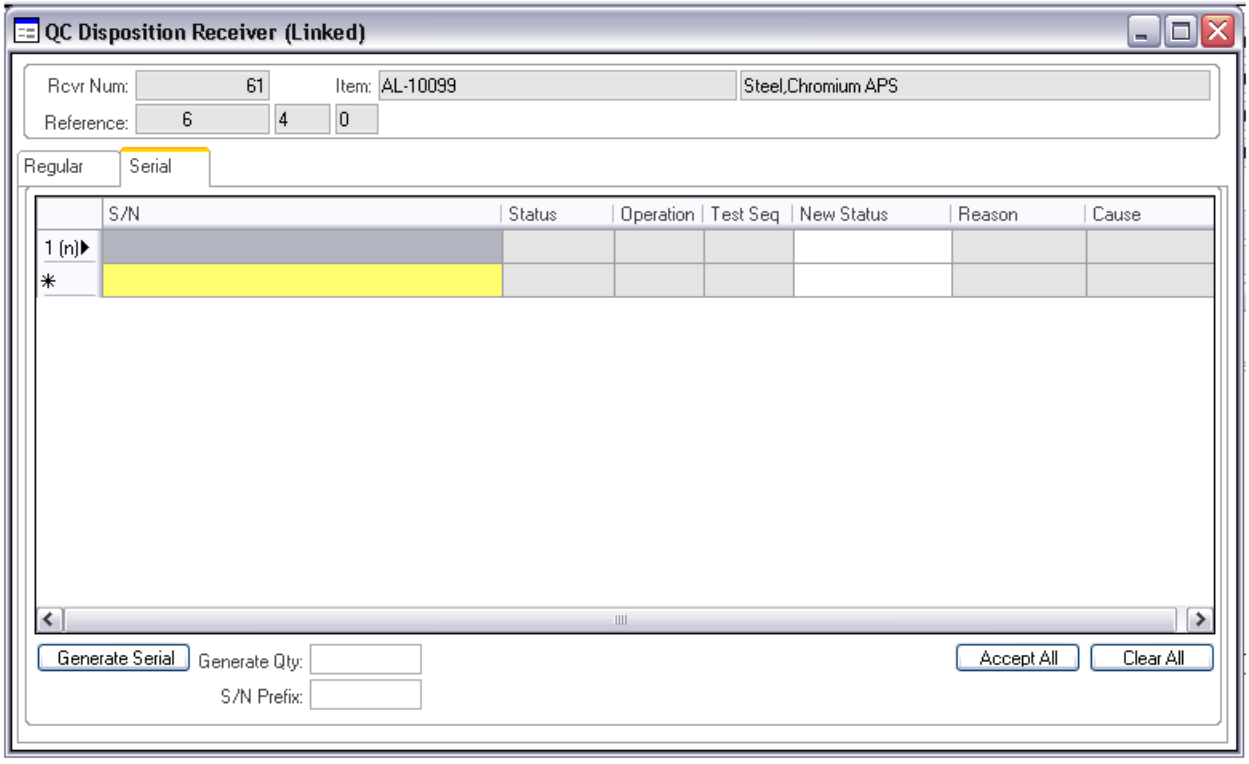
- Cancel: Exit the form without processing

Note:

1) **If you disposition more than you receive, a message will advise and ask if you want to continue.**

If the receiver being dispositioned is marked for QCS Serial Tracking, several changes occur to the Disposition form:

- On the 'Regular' Tab (see above), the user will not have access to the QC Accepted Quantity, QC Rejected Quantity or the QC MRR/Hold Quantity.
- The 'Serial' Tab will be enabled.
- A QCS Serial number must be generated for each item on the receiver. Each QCS Serial Number will be individually dispositioned, and the quantities will be added up and loaded into the 'Regular' Tab quantity fields.
- Once the QCS Serial numbers have been dispositioned, the user must return to the 'Regular' tab to choose the appropriate Disposition/Reason/Cause Codes and process the disposition.

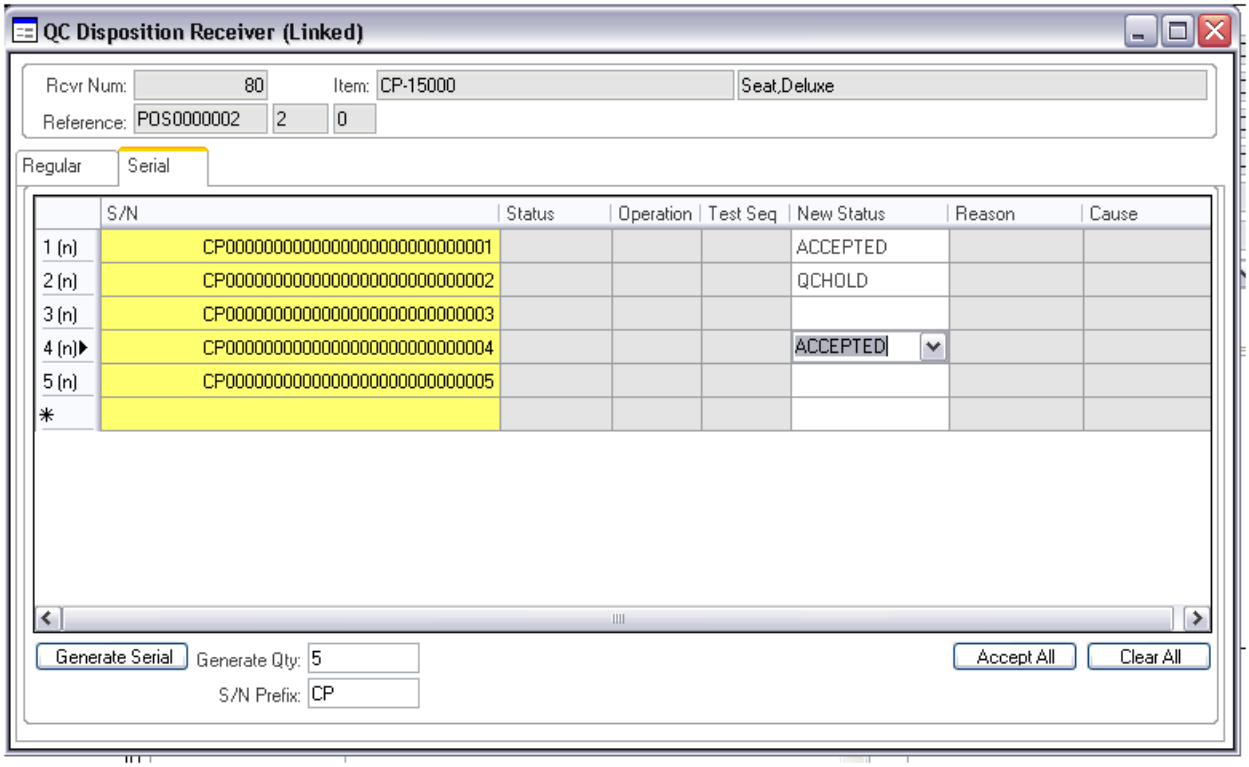


Serial Tab

- Generate Qty: If additional QCS Serial Numbers are required, enter the number to create.
- S/N Prefix: If desired, enter the QCS Serial Number prefix to be used for the numbers to be generated.
- <Generate Serial> Button: creates new QCS Serial Numbers for this receiver based on the parameters entered (above). When new QCS Serial Numbers are created, they are assigned a status of 'Received'

Serial Grid

- S/N: QCS Serial Number. New serial numbers can be generated (see above), or typed manually.
- Status: (Starting) status of this QCS Serial Number for this transaction
- Operation: Not applicable for the Supplier module
- Test Seq: Not applicable for the Supplier module
- New Status: Enter new status of the associated QCS Serial Number, or select from drop-down box.
- Reason: Display only
- Cause: Display only



- Accept All: Mark all QCS Serial Numbers with a status of 'Received' to a status of 'Accepted'.
- Reject All: Mark all QCS Serial Numbers with a status of 'Received' to a status of 'Rejected'.

When you are done marking the status (Accepted, Rejected, QCHold, Received), return to the 'Regular' Tab. You will see the total of each status in the Qty Accepted, Rejected, MRR/Hold fields. You can now indicate the Reason, Disposition and Cause codes for each status.

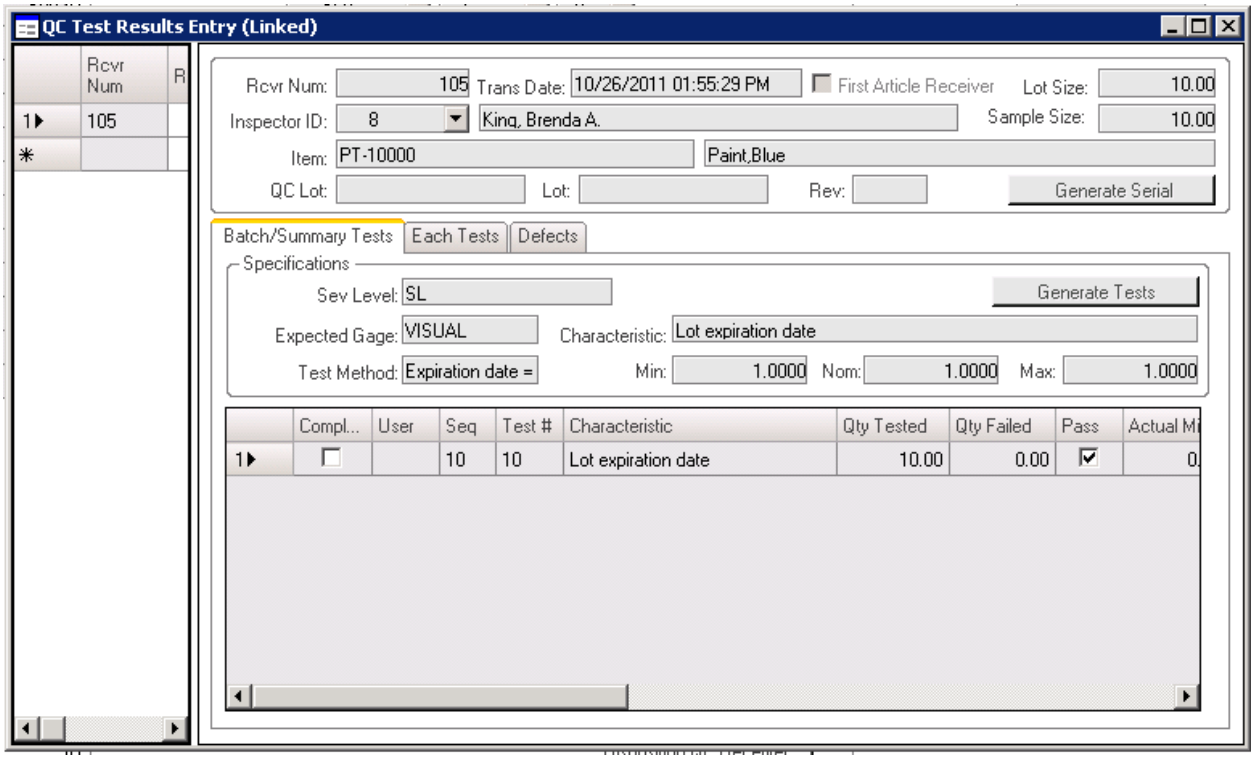
If you wish to set a different reason code, that serial number needs to be dispositioned in a separate transaction (similar to a Miscellaneous Receipt transaction for material).

All other functionality remains the same on this tab, for a serial-tracked receiver.

Note:

1) **To reverse the effect of a previous disposition transaction, you may change the New Status of a serial number BACK to RECEIVED. This will accumulate as a 'negative' against the original status.**

QC Test Results Entry



QC Test Results Entry (Linked)

DESCRIPTION: Enter the results of the tests specified for this QCS Item. Multiple sets of test results can be created for a receiver.

Field Descriptions:
Header

- Rcvr Num: QCS Receiver number displays
- Trans Date: Defaults to and displays current date for new test sets
- Inspector ID: Employee number of the person performing the inspection, name displays
- Item and Description of item receiver displays
- QC Lot: User defined
- Lot: User defined
- Rev: User defined
- Sample Size: User defined
- Lot Size: User defined

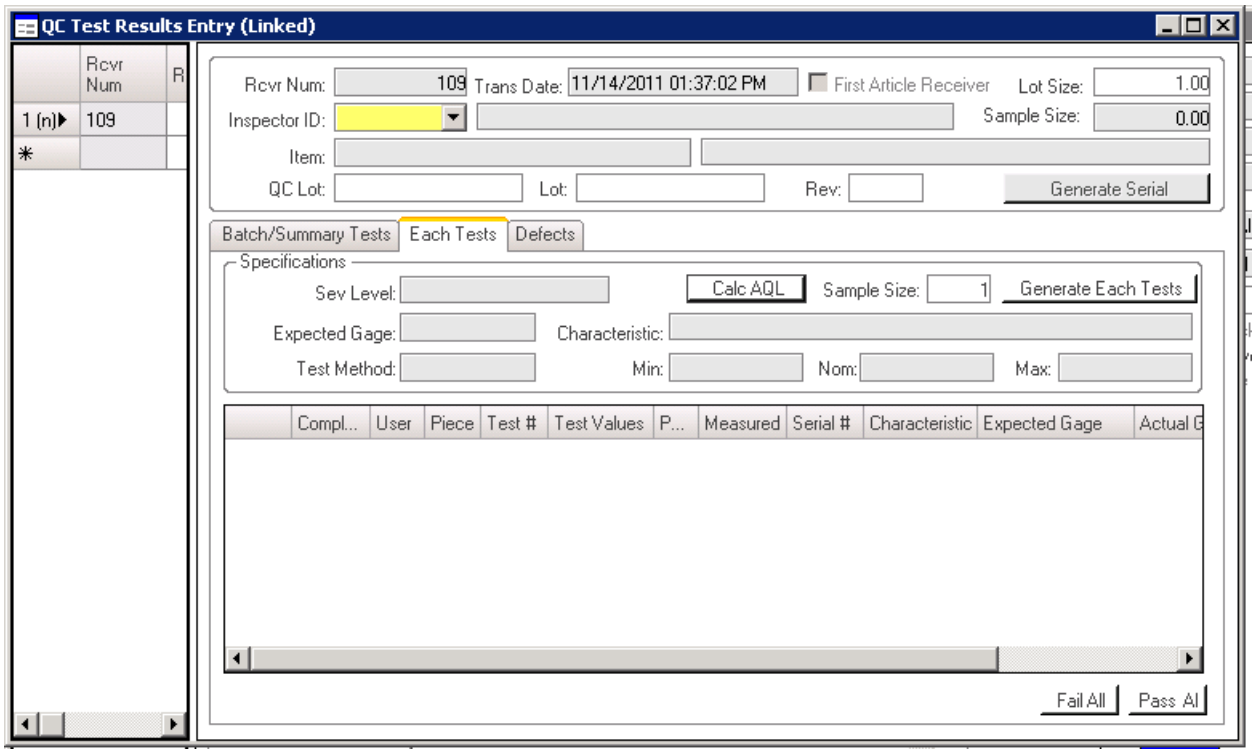
Batch/Summary Tests

Specification

Expected Gage, Test Method, Characteristic, Expected Minimum, Maximum and Nominal values are all set based on the test (Item detail). The detail data displays based on the current test selected in the browser.

Browser

- Seq: Order which inspections are to be performed
- Test #: Unique test ID number
- Characteristic: Description (see QC Item Test Setup)
- Qty Tested: Enter value
- Qty Failed: Enter value
- Pass: Optional. Check for 'pass' or leave unchecked for 'fail'
- Actual Min: Enter value
- Actual Nom: Enter value
- Actual Max: Enter value
- Gage Group: Gage group name from the gage Groups Form
- Gage Expired: Checked if the Expected gage is expired (out of calibration). If not checked the Expected gage is not expired.
- Expected Gage: Display only (see QC Item Test Setup)
- Desc: Display only description of the gage
- Actual gage: Enter the identification for the actual gage used
- Desc: Description of the actual gage used
- Measured: Enter optional text information
- Test Method: Display only (see QC Item Test Setup)



Each Tests

Note: this option is required if the receiver is QCS serial-tracked

Specification

Expected Gage, Test Method, Characteristic, Expected Minimum, Maximum and Nominal values are all set based on the test (Item detail). The detail data displays based on the current test selected in the browser.

Calc AQL

The Calc AQL button will calculate the sample size if the following have been previously set up:

- Calculate AQL for Tests has been selected in the QC Enterprise parameters (see page *75*)
- The QC Sampling Criterias Form has been filled out (see page *98*). Remember this form sets the number of completed receivers that the system will use to sum the number of rejected parts. The values in this form are then used by the system to determine if Loosened, Normal or Tightened sampling rates will be used
- The QC test Plan Sampling Rates from has been filled out (see page *99*). Remember the system uses this form to determine the percentage of the quantity received for calculating the AQL sample size.

Notes:

1) **When the Calc AQL button is selected it will enter the Sample Size based on the system calculations outlined above**
2) **The Sample Size is a suggested size and it may be changed prior to selecting the Generate Each Tests button**
3) **If there are not enough closed receivers to meet the settings in the QC Sampling Criterias Form then the Tightened Sampling Plan is used by the system.**

Browser

➢ Complete: When checked this designates that specific test as being completed and changes the rest of the row to read only. This box is manually checked and unchecked. If there are user initials associated with the person who is logged in, then when checked the User box will also be populated with the User initials. The complete designation is used for filtering purposes for some reports (SPC reporting) to identify tests that failed but are complete, from tests that were never performed.

➢ User: Is auto-populated with the logged in user's initials when a specific test is marked as complete. This can be used to have different users complete different tests on the same QC Rest Results Entry form.

➢ Piece: Sample #

➢ Test #: Unique test ID

➢ Test Values: Enter value

➢ Pass: Optional. Optional. Check for 'pass' or leave unchecked for 'fail'

- Measured: Enter optional text information
- Serial #: Displayed if serial tracked item
- Characteristic: This is the Characteristic from the specifications header.

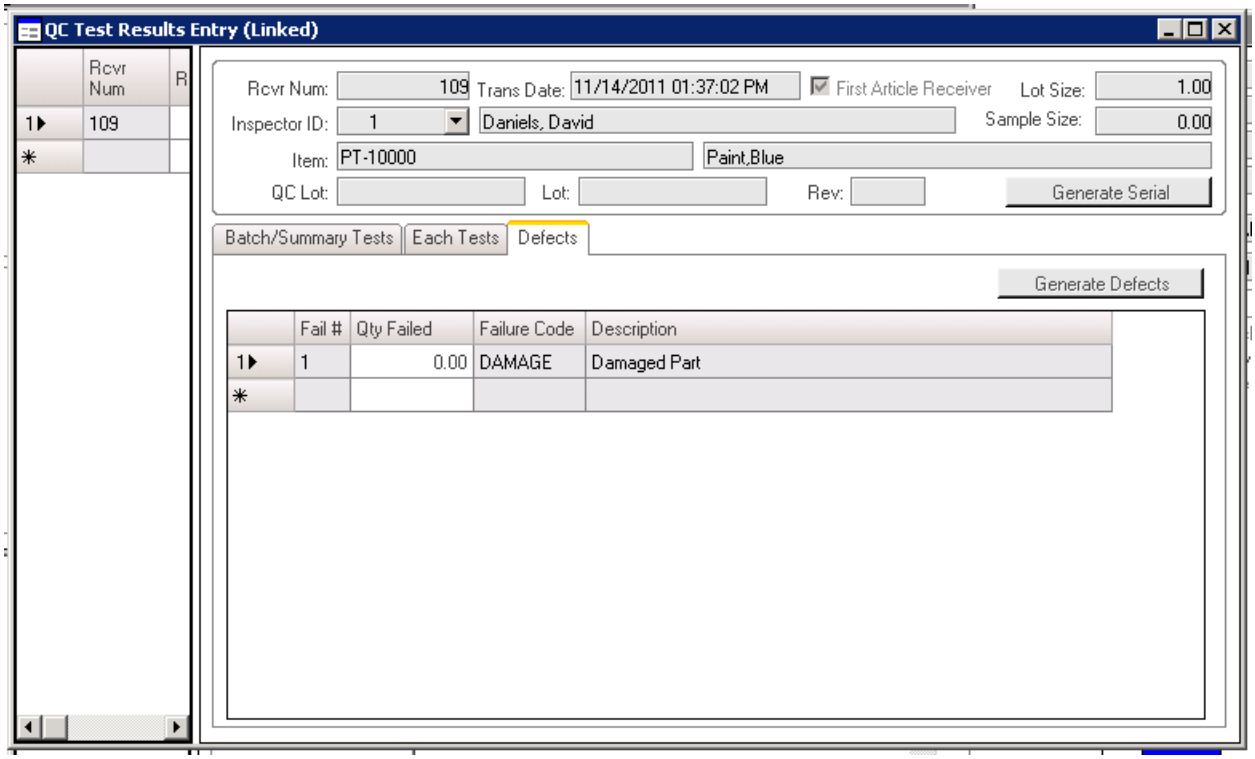
Process:

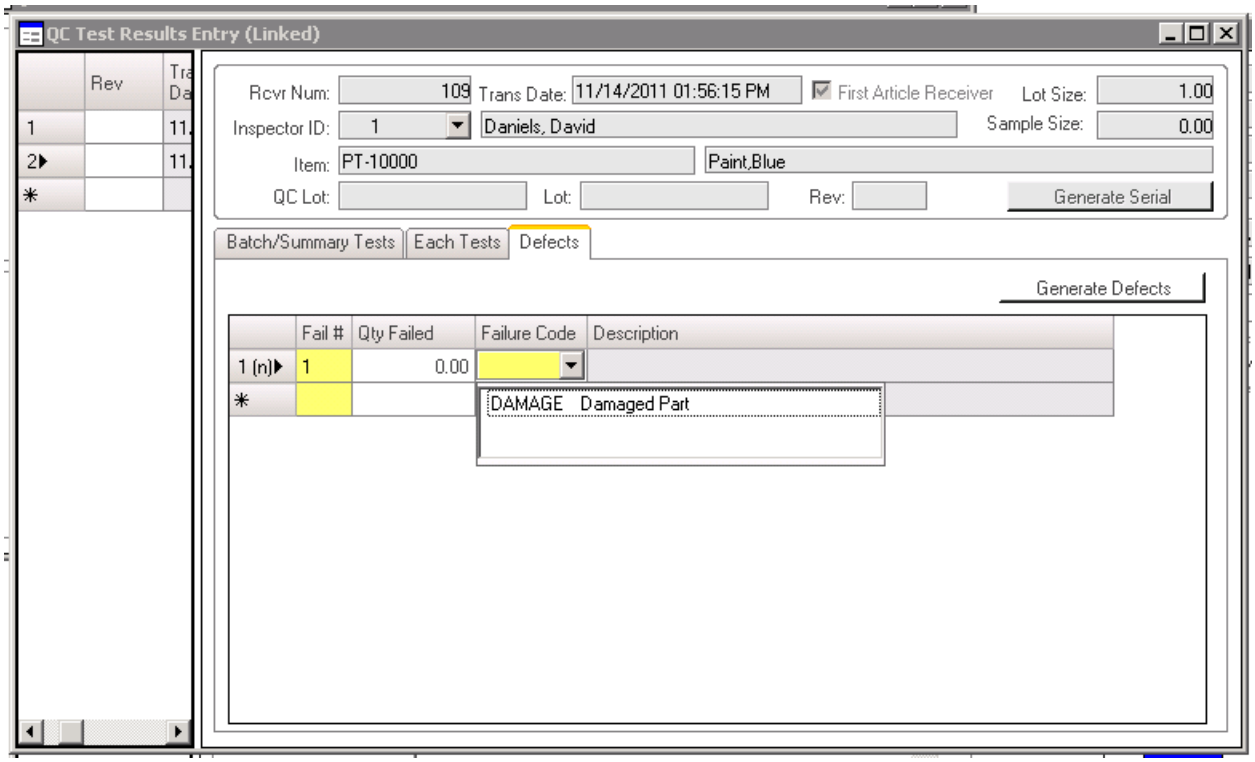
- Enter the inspector ID
- Optionally enter/edit Sample Size, QC Lot, Lot, Rev, and Lot Size
- Select either the Batch or Each Tests tab.
    - If Each is selected:
        - If item is NOT QCS serial tracked, enter the number of entries you wish to have created for each test OR select the Calc AQL button to have the system enter a recommended Sample Size
        - If item IS QCS serial tracked, one entry will be created for (and associated with) each serial number that exists for this receiver. If you need to create serial numbers for this receiver, use the <Generate Serial> button.
- Select the <Generate Tests> button
- You will receive a message box: 'Test set creation succeeded' <OK>
- Enter data as required for this receiver.

Note:

1) **Test results are independent of dispositioning.**

QC Test Results Entry - Defects





QC Test Results Entry (Linked) - Defects tab

DESCRIPTION: Enter number of failures per code for this receiver. Please see the QCS Setup Section of this manual for Failure Code setup.

Process:

2) Access the Supplier Inspect/Disposition form
3) Select a Receiver
4) Select the <Record Tests/Defects> button
5) Select the 'Defects' tab
6) Enter an Inspector ID

- There are two different methods to select/enter Defect Quantities:
    - (see the first screen image earlier in this section)Select the 'Generate Defects' button
        - An entry will be created for each Failure code associated with the Supplier Ref Type ('P')
        - Enter the Qty Failed as applicable for this receiver for a given failure code

- (see the second screen image earlier in this section) Begin to type the defect code into the Failure Code column (or select the drop down arrow)
    - Select the specific Failure code you want and hit enter.
    - Enter the Qty Failed

NOTE: This method allows you to select which Failure Codes show and may be easier than creating an entire list of Failure Codes and trying to find only the codes that are relevant for that receiver.

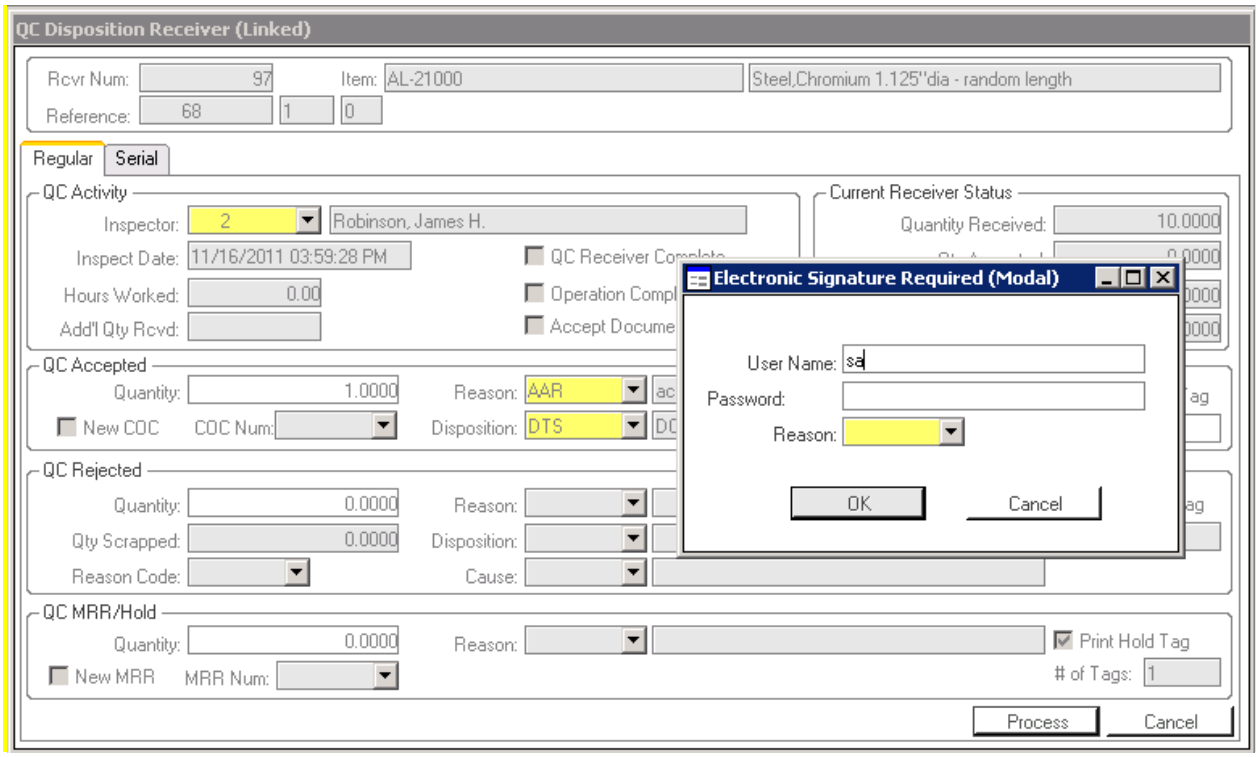
Note:

1) **Defects can only be recorded against QC Items with at least one Test define.**

Electronic Signatures

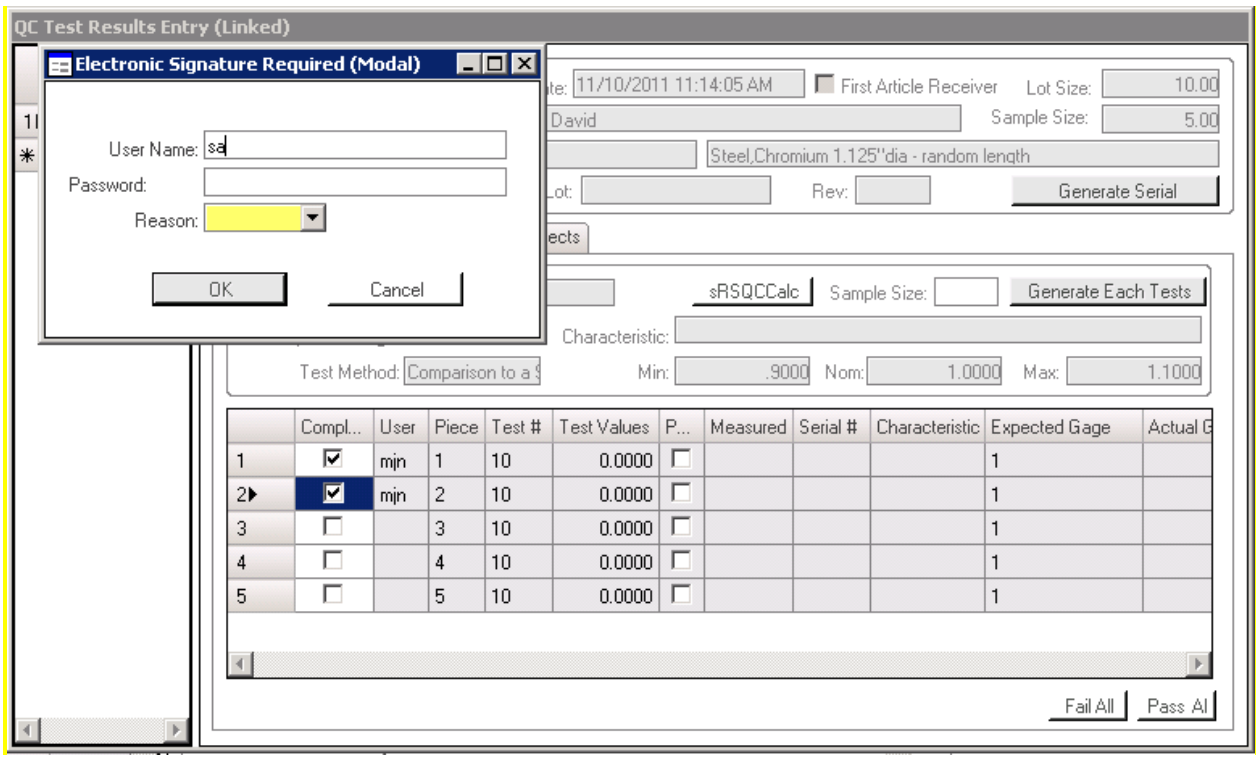
Using Electronic Signatures in QCS

Once Electronic Signatures are turned on and user(s) are authorized, you can now use the functionality (See page *36*). Upon pressing Process during a receiver disposition or MRR disposition, you will see the Electronic Signature Required box;



You must fill in the user name and password of an authorized signer (you do not have to use the user name and password of the logged in user; any authorized signer may fill this in.), and you must select an electronic signature reason code.

Similarly, when recording Each Tests, if electronic signatures is enabled, the signature box will display when checking or unchecking the “Complete” check box in the test results grid;



Notes:

1) **This functionality is only available if you are running SyteLine version 8.03 or later.**
2) **Please refer to the Infor SyteLine documentation for electronic signatures for additional information and best practices.**

Managing Non-Conforming Material

There are several options for handling material that is non-conforming, or needs additional testing/review:

Method 1

The material may be immediately dispositioned as REJECTED. The appropriate reason code, disposition code and cause codes are recorded for the transaction. Where desired (and as coded), a Material Move or Material Issue can then be run for the rejected items.

Method 2

When identifying a quantity as REJECTED while dispositioning, you can set the parameters to ask the user if they wish this particular set of rejected items to be moved to an MRR. If so, the

items will be put ON HOLD, and either applied to an existing MRR, or a new MRR will be created. If moved to an MRR, final disposition must be made from the MRR.

Method 3

The material may be dispositioned as MRR/ON HOLD. These items can be added to an existing MRR for this receiver, or a new MRR can be created. Final disposition must be made from the MRR.

Notes:

1) **An MRR can only be created during the disposition of a Receiver for a QC item, or via the Quick MRR/Receiver Utility (based on parameter settings).**
2) **Creating an MRR does not move material.**
3) **Final disposition of the material from the MRR can move material, based on your disposition code(s).**
4) **Once an MRR is created, it cannot be deleted.**
5) **An MRR is linked to one and only one receiver.**
6) **Multiple MRRs can be created for one receiver.**
7) **MRR numbers are system-generated.**

Using one or more of the above methods, a process will be set up to incorporate QC into your current or new process flow for non-conforming material. A typical flow might be:

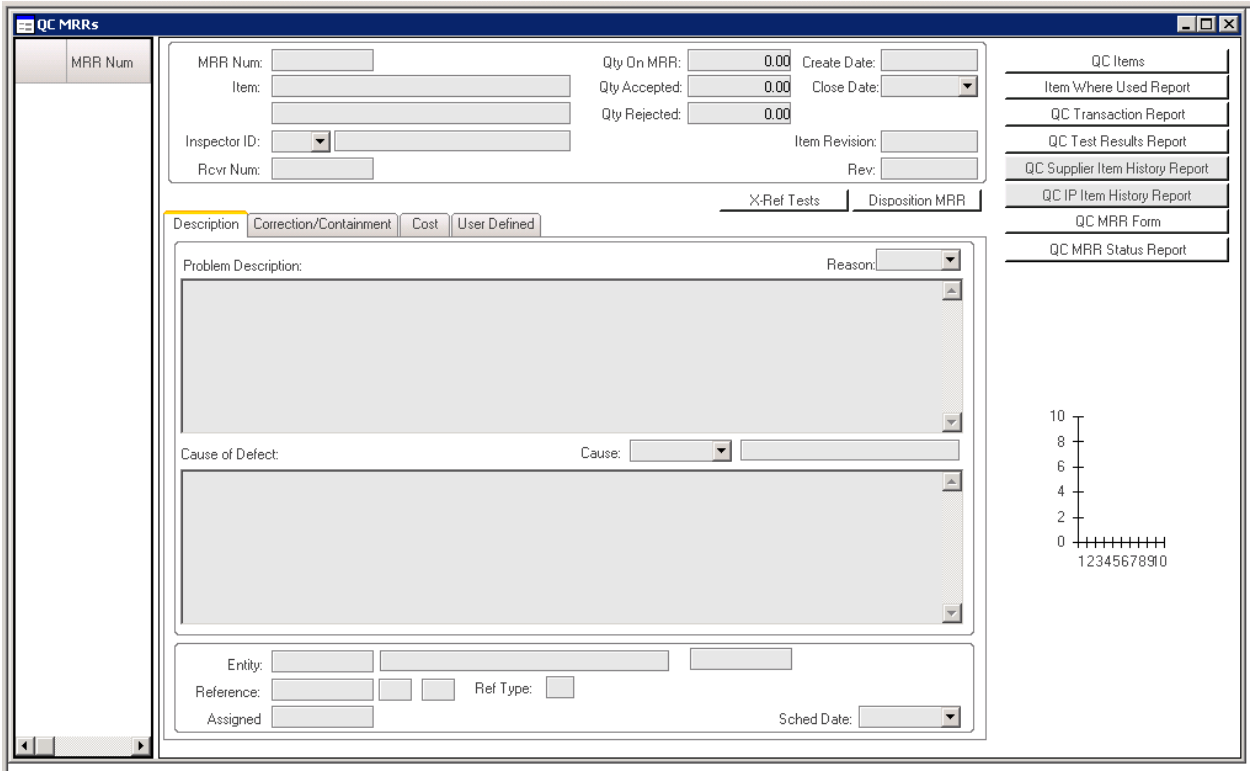
1) Discrepant material is identified and entered into QCS as rejected or MRR/On Hold, creating an MRR.
2) A designated individual is responsible for notifying the appropriate people (e.g. members of a Material Review Board/MRB) of the issue and calls a meeting to address the MRR.
3) The MRB meets and decides either a) on a disposition or b) assigns someone to investigate and schedule a follow-up meeting for final disposition (this may result in the

generation of a CAR to ensure that the cause of this incident is corrected to prevent a reoccurrence).

4) The discrepant material is dispositioned.

   The MRR is completed

QC MRRs



QC MRRs

DESCRIPTION: Form is used to edit values on MRRs. No add or delete is allowed.

Field Descriptions:
Header

Displays the MRR #, Create Date, Ref Type, Item Number and Description, Receiver #, Quantity on the MRR, MRR Quantity Accepted, MRR Quantity Rejected

- Close Date: Enter a date to indicate there will be no further action on this MRR. Clear date to re-open the MRR.
- Item Revision: is the SyteLine item revision and is read only
- Rev: User defined

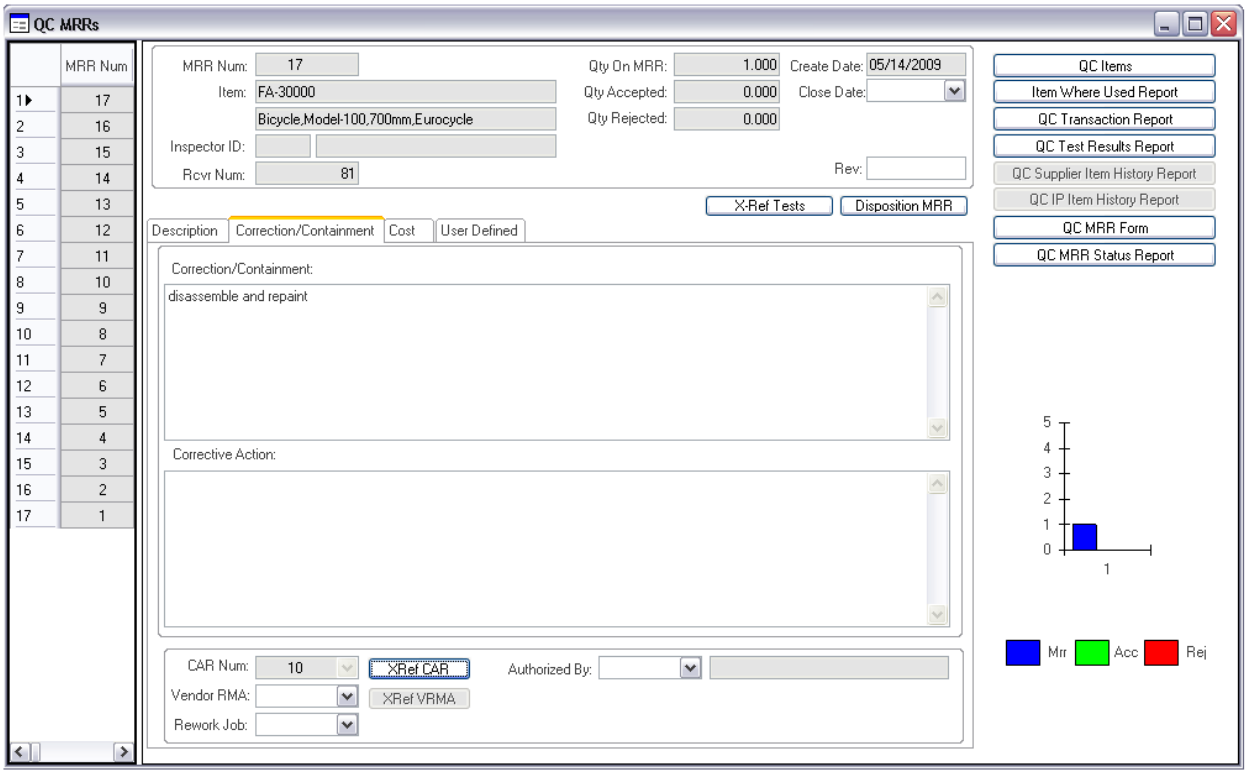
Descriptions Tab

Displays vendor number and name (Entity), if the receiver references a vendor, and the PO Num/Line/Release (Reference), if the receiver references one

- Problem Description: User defined (400 characters)
- Reason: Select a reason code
- Cause of Defect: User defined (400 characters)
- Cause: Enter a code for the underlying problem which resulted in the MRR being created.
- Scheduled Date: User defined
- Assigned to: User defined

Buttons:

- X-Ref Tests: Launches QC MRR Cross Reference Tests (Linked) form. The user can associate specific test results from the receiver with the MRR (page *278*).
- Disposition MRR Button: Launch QC Disposition MRR form for the current MRR (page *258*)



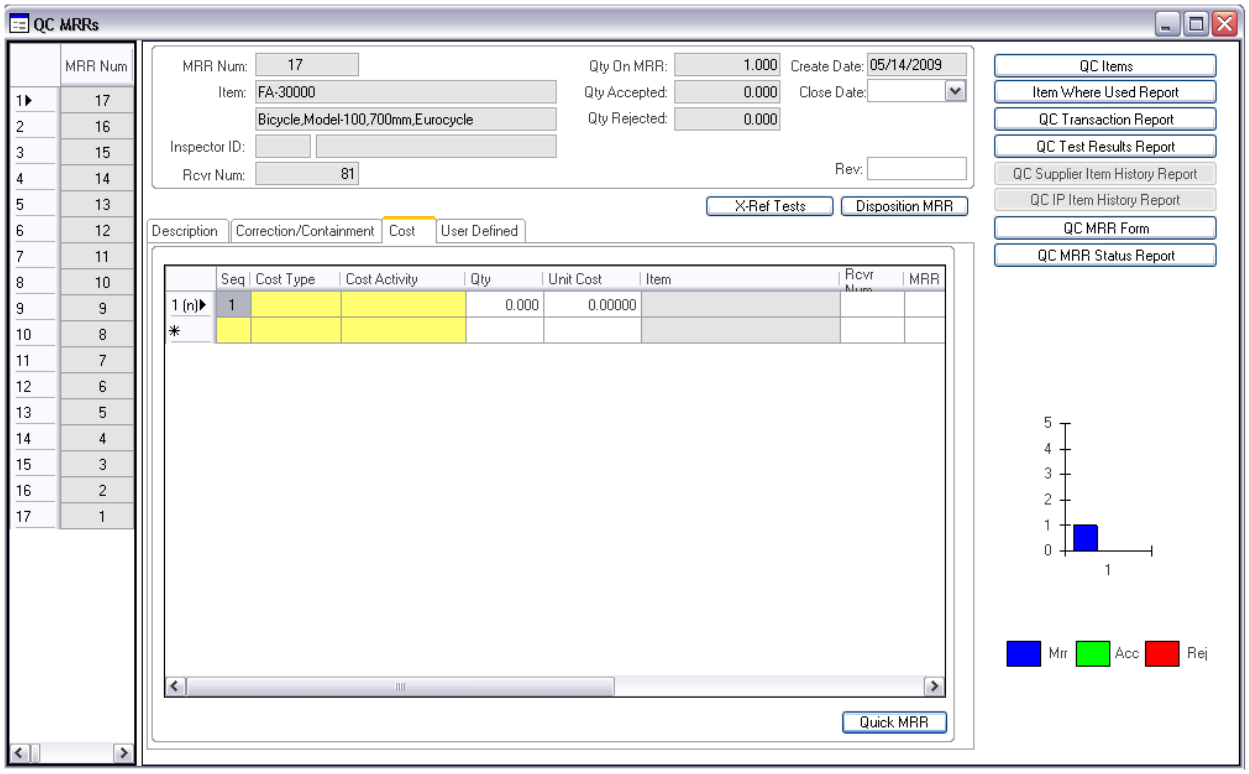
Correction/Containment Tab

- Correction/Containment: User defined (400 characters)
- Corrective Action: User defined (400 characters)
- CAR Num: Displays CAR number if there is one linked to this MRR, user can point this CAR to an existing CAR (if none already is set for this MRR).

- Rework Job: Can be set to an existing SyteLine job. Reference only
- Vendor RMA: Displays Vendor RMA number if there is one linked to this MRR
- Authorized by: If used, must be an employee number from SyteLine Employees

Buttons:

- XRef CAR: If a CAR is cross-referenced to this MRR, launch the QC CARs form. If no CAR is linked, create a CAR linked to this MRR. If a CAR is created, and parameters are set up to do so, an e-mail will be sent to the address(es) displayed in 'Notification' field.
- XRef VRMA: Only for Ref Type 'P'. Not active for Ref Type 'C' (customer)



Cost Tab

- Seq: System-generated
- Rcvr Num: If there is an existing QC Receiver related to this MRR, you may enter the number (not validated).
- MRR Num: If there is another MRR related to this MRR, you may enter the number (not validated).

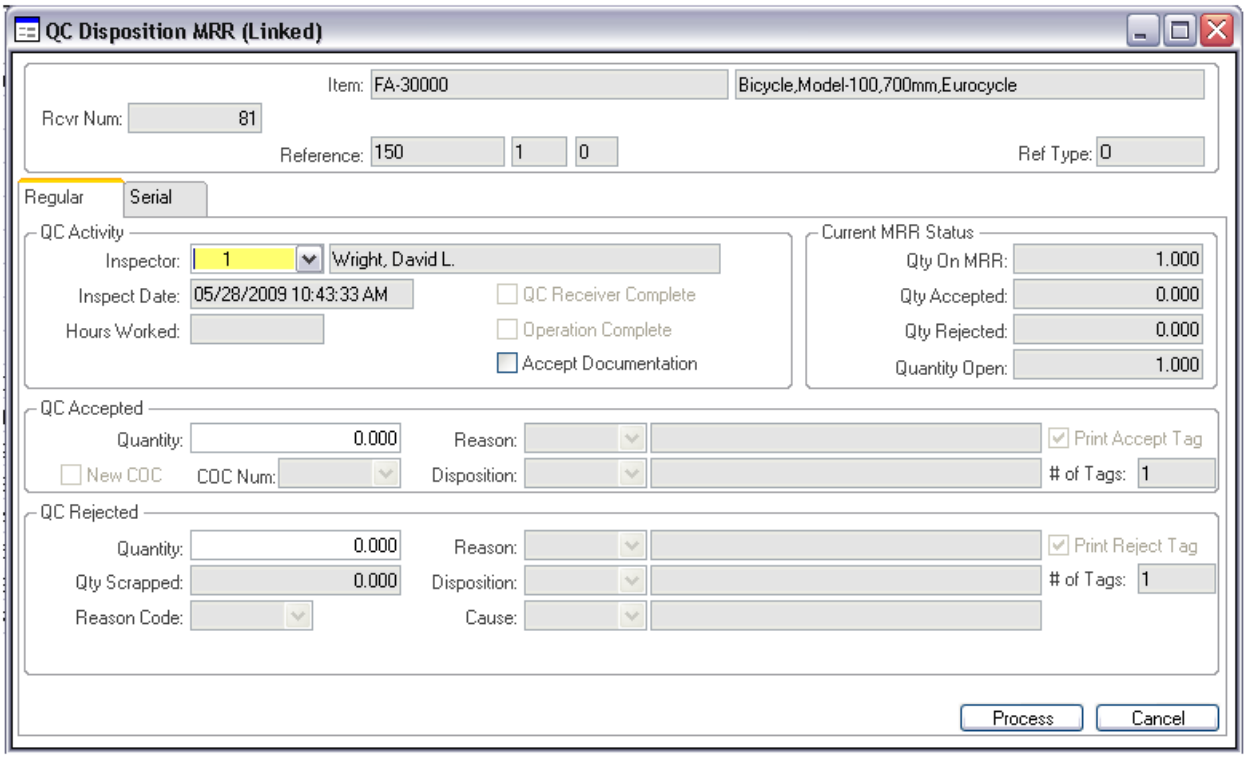
- Item: If there is another item related to this MRR, you may enter it (not validated).
- Cost Activity: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece
- Problem Description: User defined
- Create Date: Set with the system date with this cost entry is created
- Description: User defined

Buttons:

- Quick MRR: Brings up the Quick Receiver/MRR Utility form (see QC Setup Manual)

Note:

1) **MRR costs are not linked with SL financials.**



QC Disposition MRR (Linked) (Disposition MRR button)

Field Descriptions:
Header

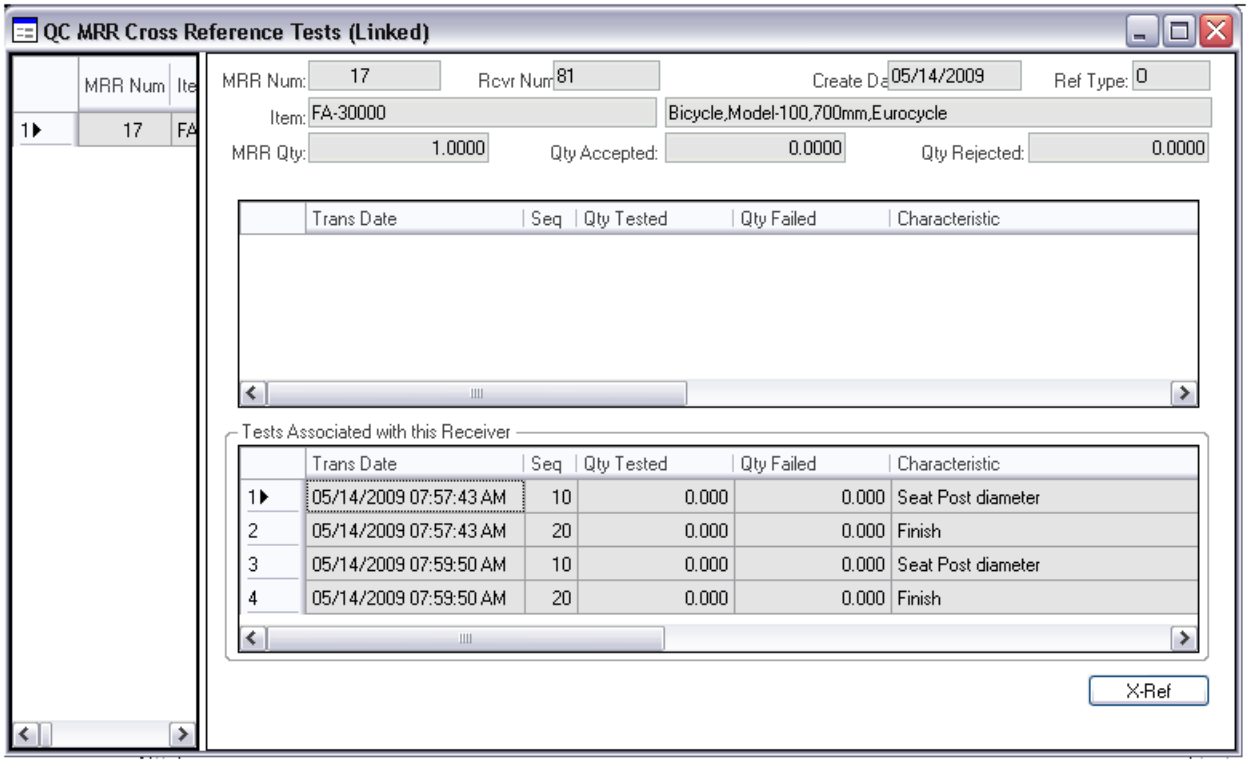
Displays the receiver number, Item number and description, Job/Suffix or PS ID, Operation, WC and WC Description

Test Results: If QC General Parameter 'Check for Test Results' is set to 'Alert-If Defined', a message will be displayed upon entering this form if there are test results defined for this QC Item. If 'Check for Test Results' is set to 'Required-If Defined' and there are test results defined for this QC Item, you will not be able to enter a disposition until/unless there are test results recorded for the receiver. If 'Check for Test Results' is set to 'Required-Always', you will not be able to enter a disposition until/unless there are test results recorded for the receiver.

Please see QC Regular Disposition for details (page *258*).

Differences: This form is only used to disposition from an MRR – you cannot put items on an MRR/On Hold from here (as they are already On Hold). Accepted/Rejected amounts will be applied to the Receiver associated with this MRR (and recorded against the MRR).

Xref Test Results to an MRR



QC MRR Cross Reference Tests (Linked) (Xref Tests button)

Field Descriptions:
Header

Displays detailed information from the MRR.

First browser shows tests associated with the MRR to date (e.g. if empty, no tests from the Receiver are associated with the MRR). In the above example, one test result line (for 05/14/2009 with 10 tested and 0 failed) has been associated with the MRR.

Tests Associated with this Receiver

- Displays all test results associated with the receiver linked to the MRR. To add the test result to the MRR, select the line in this browser, then click the <X-Ref> button. The test should now also display in the upper browse.

Managing a Certificate of Conformance

DESCRIPTION

When the Quality department has made the decision to disposition material as ACCEPTED, the QCS system allows for Certificates of Conformance to be created and linked to a receiver. A C of C must be printed to allow the item to ship.

SETUP

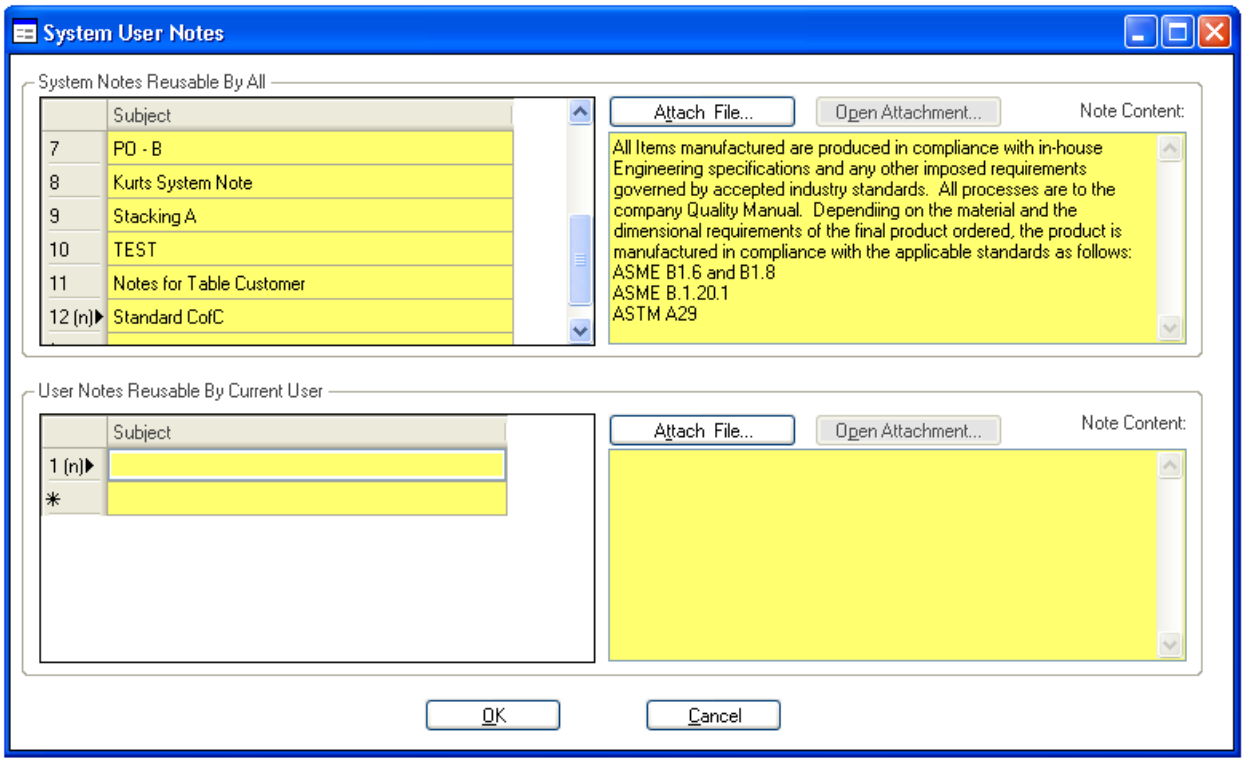
On the QCS Item form, General tab Check 'C of C required' for an item with reference Type O.

The system will automatically create a C of C when quantity is dispositioned as accepted. The items will not be available to ship until the C of C is printed.

NOTES:

1) **A C of C can only be created if a Receiver number exists for an item.**
2) **A C of C does not track material: It references a receiver number for the material which is linked to inspection results/ and a specific Customer order.**
3) **Once a C of C is created, it cannot be deleted.**
4) **Multiple C of Cs can be created per receiver number.**
5) **The system assigns C of C numbers.**

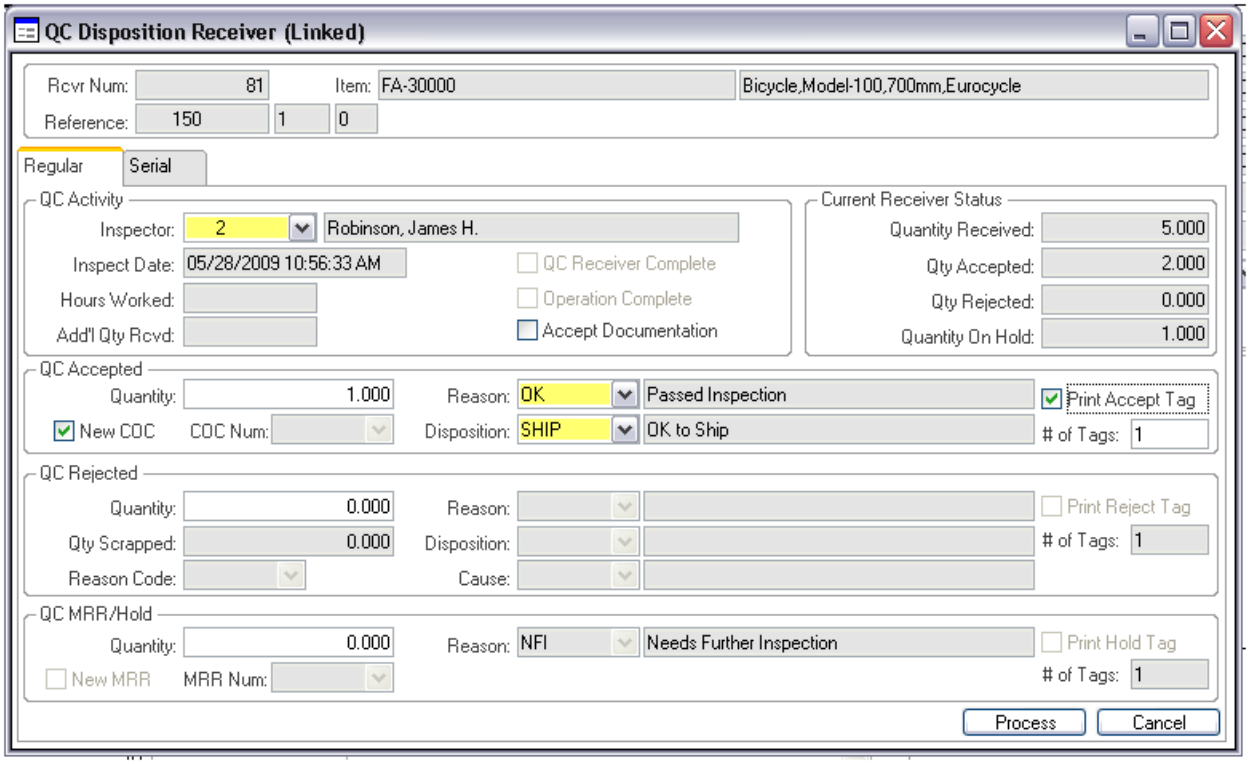
Standard C of C Text



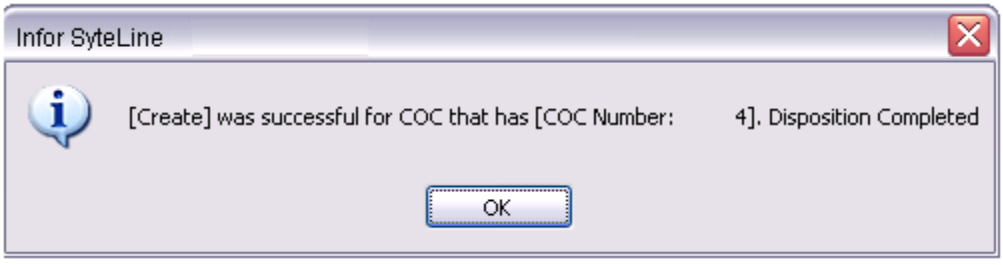
Reusable Notes

The form provides a place for the user to save text that can be selected to appear on a Certificate of Conformance.

Multiple C of Cs for a Receiver



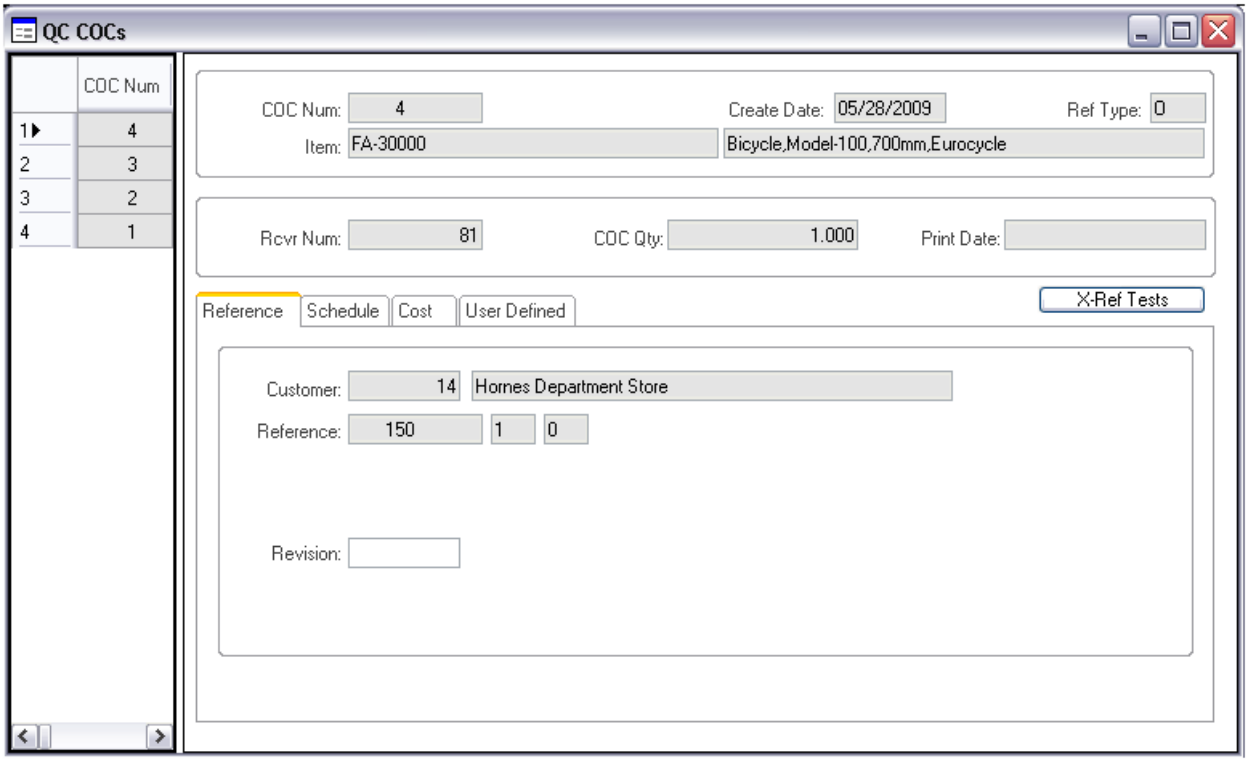
CO Inspect/Disposition
(COC Num field is enabled when > 1 ACCEPTED disposition is performed against a receiver)



If a C of C already exists for a Receiver and additional material is accepted, the user has two options:

1. Create a new C of C for the receiver (Default)
2. Add to an existing C of C for the receiver

C of C Maintenance



Quality + QC COCs

Heading Section 1

Displays the C of C #, Date created, Reference type, Item Number, and Item Description

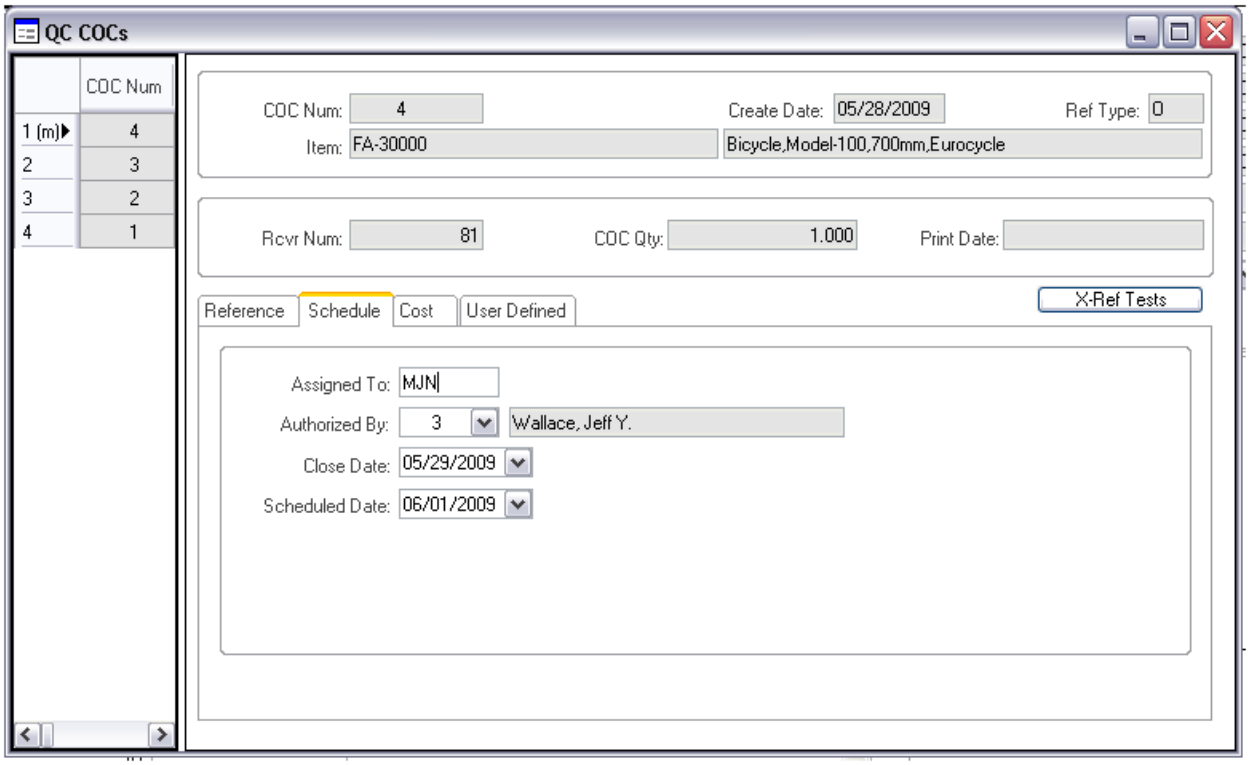
Heading Section 2

Displays the Receiver number, COC Qty, Print Date

Reference Tab

- Customer: SL Customer # and Name
- Reference: Customer Order Number, Line, Release
- Revision: QCS Item revision (Optional)

C of C Schedule Tab



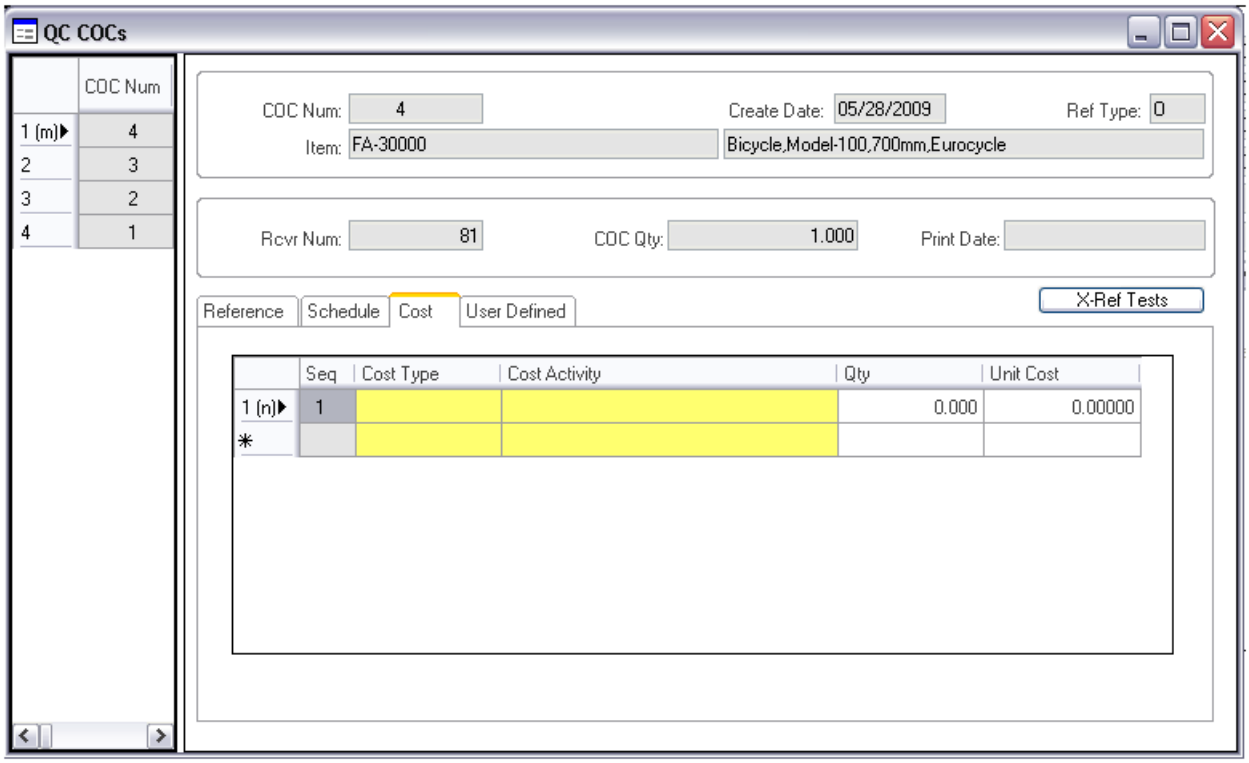
Schedule Tab

- Assigned to: User defined up to (7) characters
- Authorized by: From SL Employee Master
- Close Date: Date the COC marked as completed
- Scheduled Review Date: Date the COC is scheduled for completion

Note:

1) **An entry in Authorized by & Close Date signifies the C of C is closed. The C of C can be re-opened by removing entries in both fields.**

C of C Cost Tab

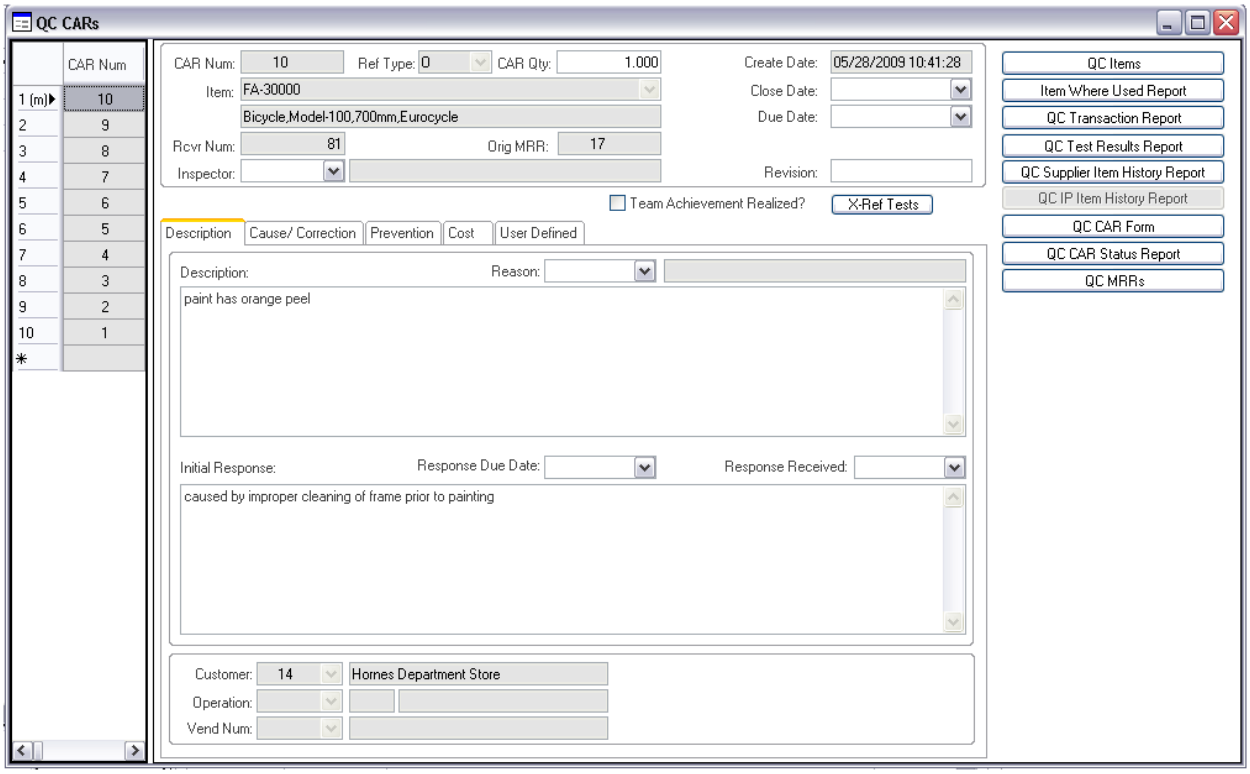


Cost Tab

- Seq: Line number
- Cost Type: General QC Cost category, user defined from table
- Cost Activity: Description of the task, function, items
- Qty: Typically references hours or # of pieces
- Unit Cost: Typically $/hour or $/piece

Note:

1) **C of C costs are not linked with SL financials.**



QC CARs

DESCRIPTION: Maintain CARs. A CAR can be created independent of QCS activity.

Field Descriptions:
Header

- CAR Num: System generated next available number
- Ref Type: P, J, R, or O
- CAR Qty: User defined
- Create Date: Displays the system date when the CAR was created
- Item/Description: Displays CARs Item number and its SyteLine description
- Close Date: User defined date to show when the CAR was closed
- Rcvr Num: If CAR was created from an MRR, displays receiver number linked to that MRR

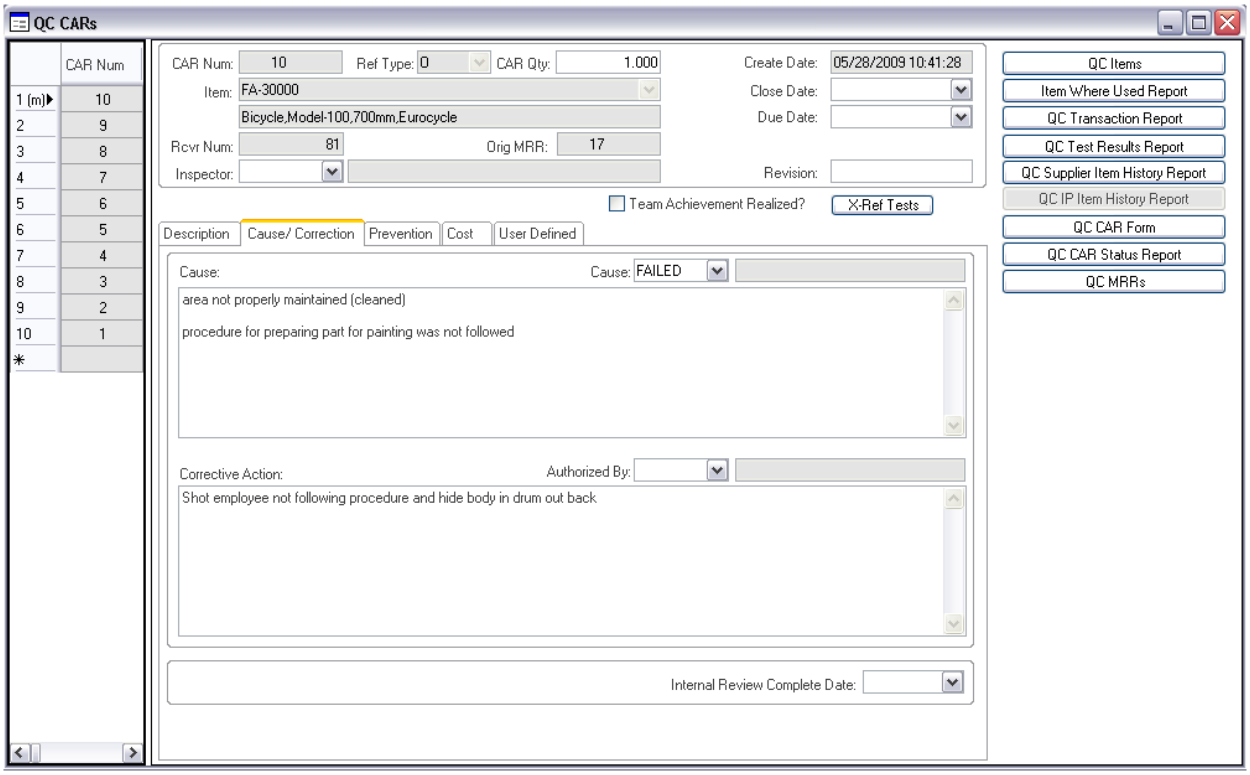
- Orig MRR: If CAR was created from an MRR, displays related MRR number
- Internal Review Complete Date: User defined date field
- Inspector: User defined, validated against the SyteLine employee table. Name will display
- Team Achievement Realized?: User defined

Buttons:

- MRRs: Jump to MRR form for linked MRR
- X-Ref Tests: Assign test results (if a receiver is linked) to the CAR (works identical to Xref Test Results to an MRR description - see page *283*)

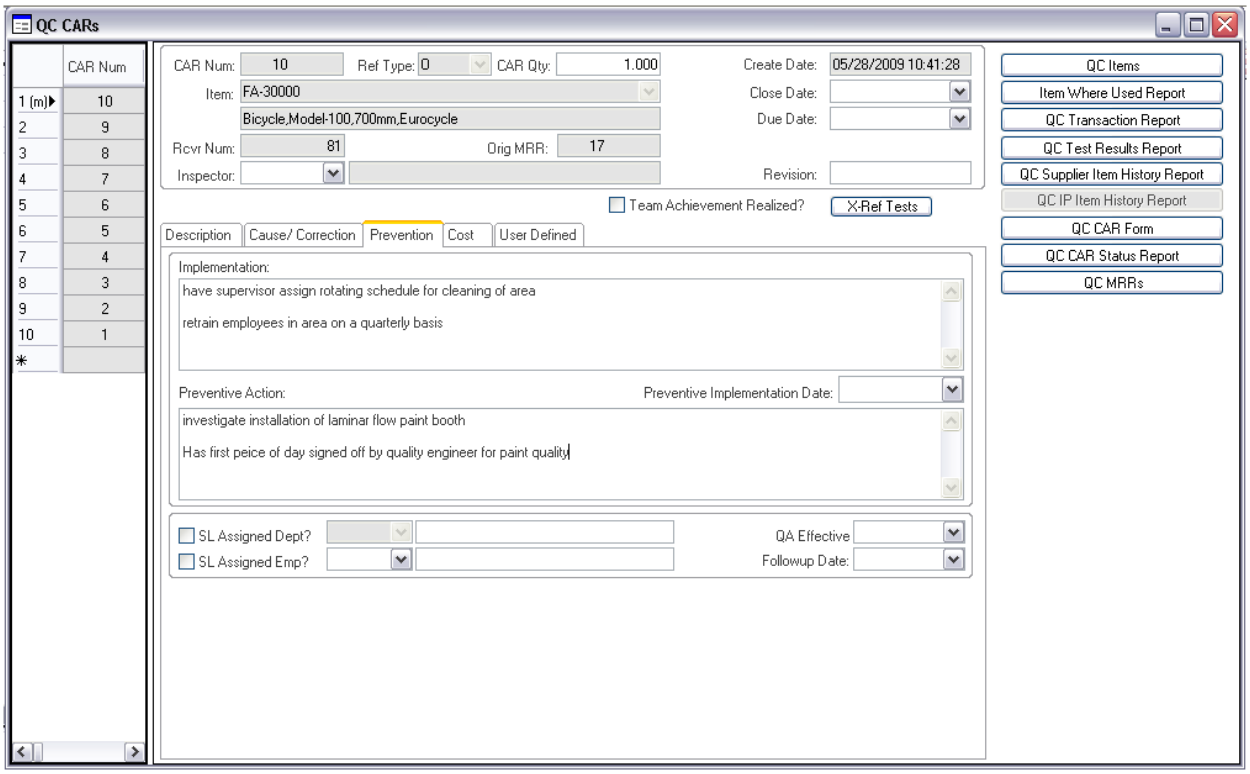
Description Tab

- Reason: Select a reason code validated from the QC Reason Codes Table
- Problem Description: User defined (400 characters)
- Response Due Date: User defined
- Response Received: User defined
- Initial Response: User defined (400 characters)
- Customer/Operation/Vendor: Displays information from Receiver, if applicable



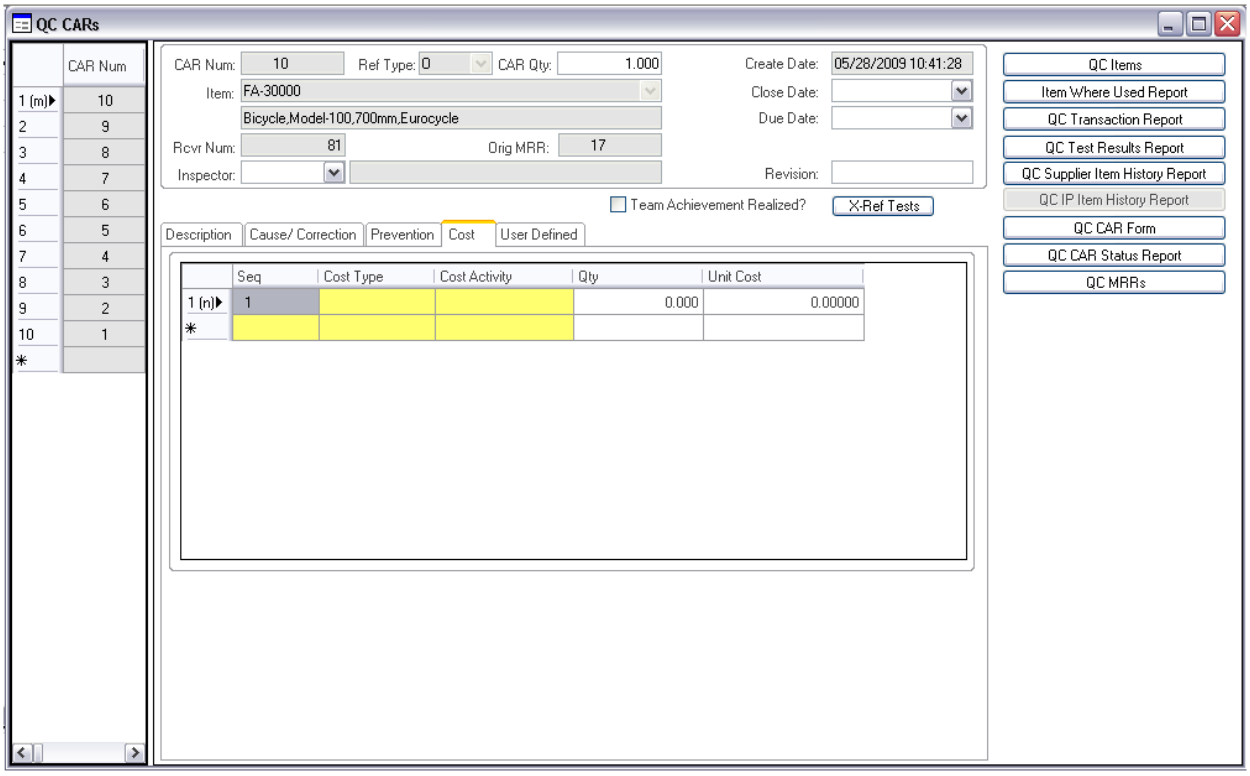
Cause/Correction Tab

- Cause: Select cause validated from QC Cause Codes table
- Cause of Defect: User defined (400 characters)
- Corrective Action: User defined (400 characters)
- Authorized By: If entered, validated again SyteLine employee table



Prevention Tab

- Implementation: User defined
- Preventive Implementation Date: User defined
- Preventive Action: User defined
- SL Assigned Dept?: If you wish to designate a SyteLine department for the CAR, check this box, enter the department ID in the next box (and its description will display); if not checked, a freeform entry can be entered in the dept description.
- SL Assigned Emp?: If you wish to designate a SyteLine employee for the CAR, check this box, enter the employee number in the next box (and the person's name will display); if not checked, a freeform entry can be entered in the employee name.
- QA Effective: User defined
- Follow up Date: User defined

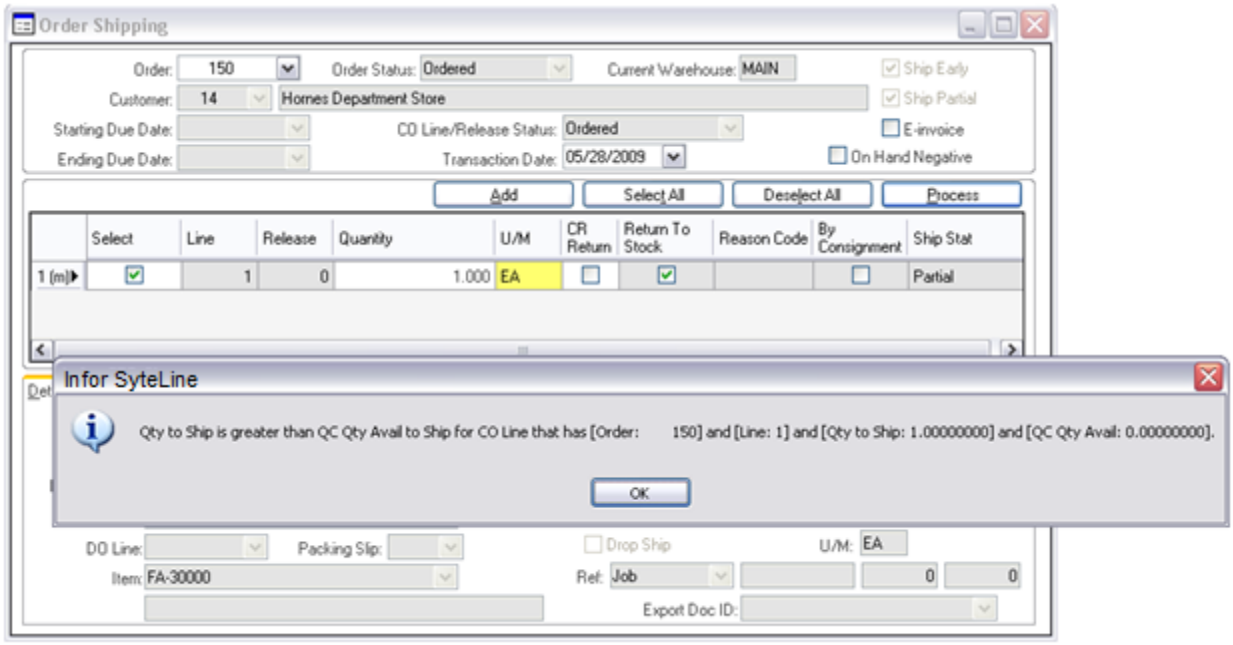


Costs Tab

- Seq: System-generated
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Cost Activity: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece

Notes:

1) **Once a CAR is created it cannot be deleted.**
2) **An entry in 'Close Date' and 'Authorized By' closes a CAR. The CAR can be re-opened by removing the values from these fields.**
3) **CAR costs are not linked with SyteLine financials.**

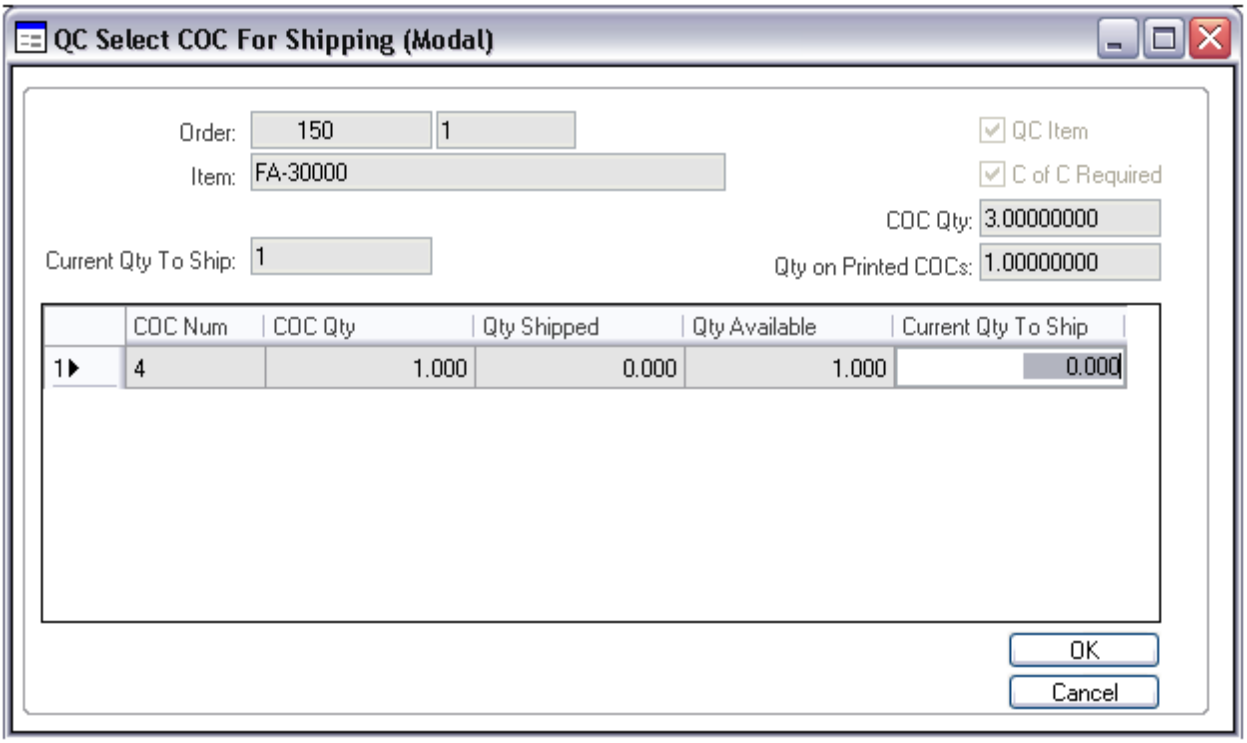


DESCRIPTION: A reference type 'O' QCS item that has the 'COC Required' flag set will affect the process for shipping the Customer Order line. The above message indicates that this line item requires QC prior to shipment. Once <OK> is selected a list of valid COCs will be displayed for the shipper to select from.

Note:

1) **QCS ref type 'O' items that do not have 'C of C required' selected, must be dispositioned in QCS before they can be shipped in SL.**

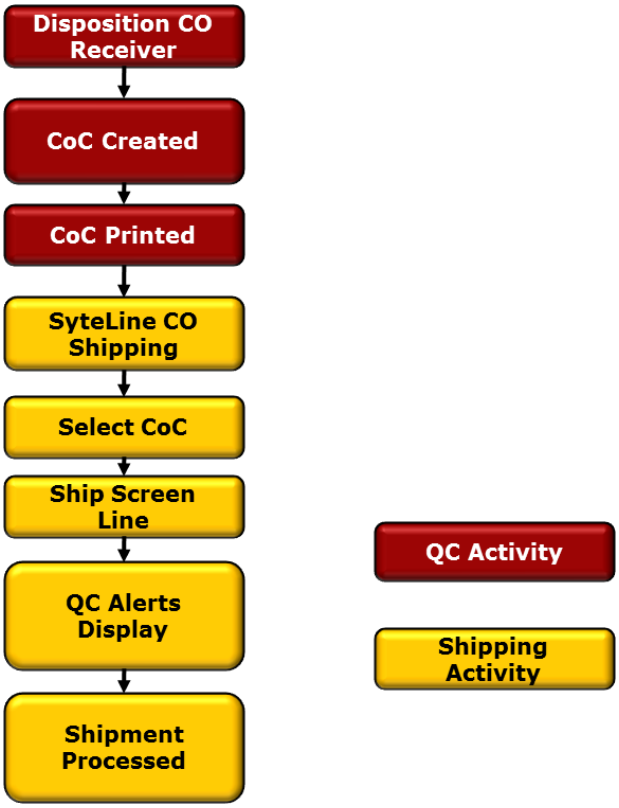
Select a C of C for Shipping



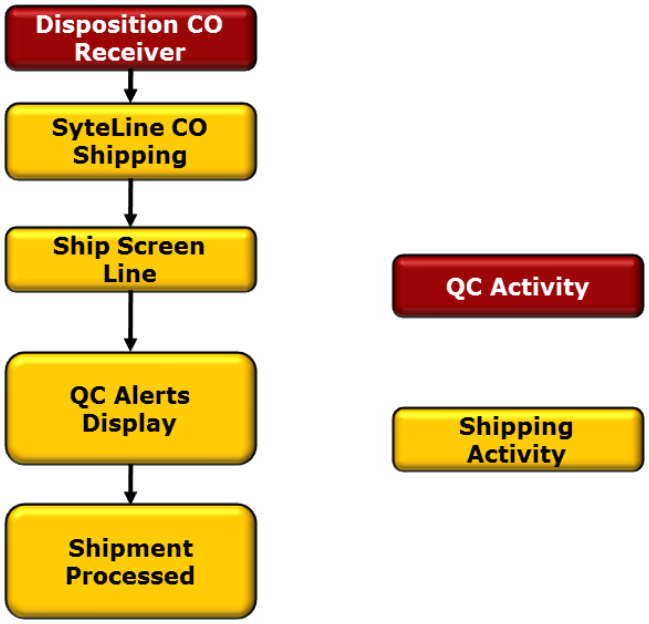
DESCRIPTION: The shipper will enter the Current Qty To Ship and select <OK>.

Once the CO line that requires a COC has been selected, standard SL shipping will occur.

Shipping a QCS Item with C of C Flow Diagram

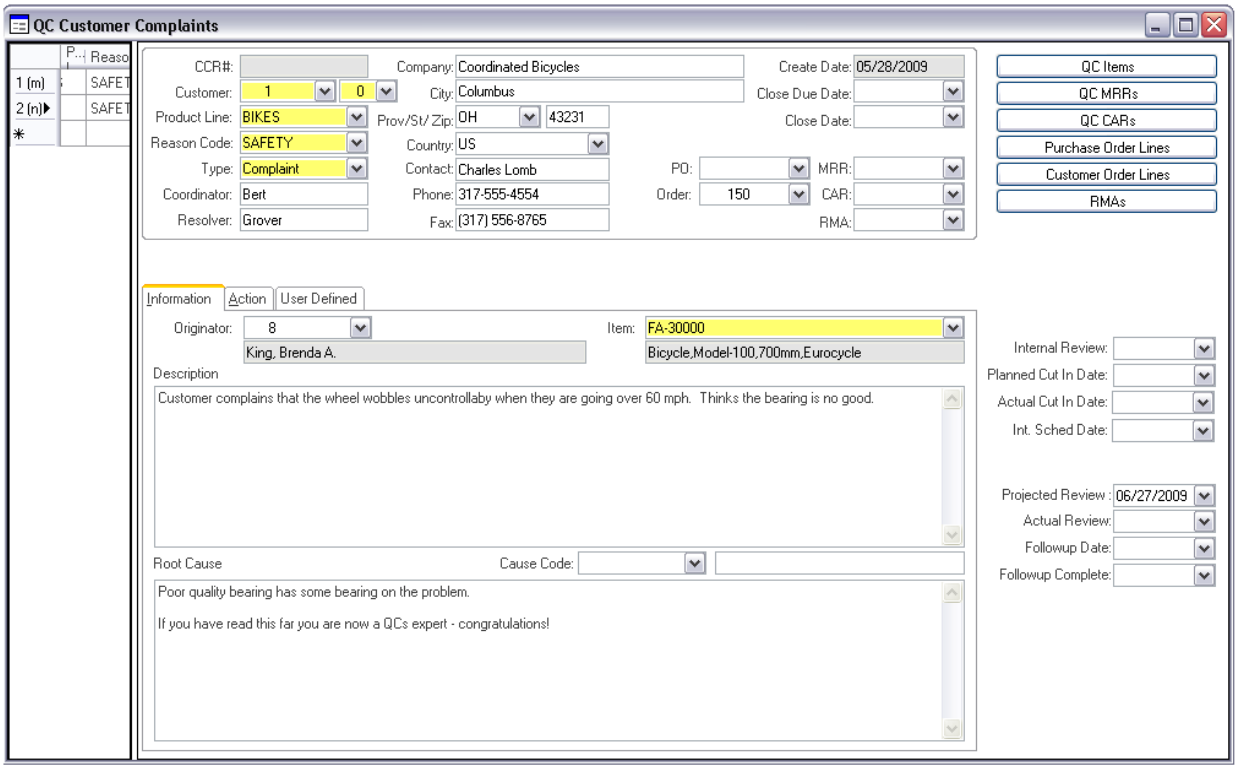


Shipping a QCS Item without a C of C Flow Diagram




Contact from Customer
Create CCR
Review & Assign Responsibility
Define Corrective Action
Review with Customer
Accept?
No
Revise
Yes
Yes
Implement & Follow-up
Satisfied?
No
Yes
Complete CCR

Customer Complaints



QC Customer Complaints

DESCRIPTION: As part of the ISO 9000:2000 compliance, companies are required to capture, respond to and analyze customer issues. This includes complaints, feedback, and other customer initiated communication. The CCR (Customer Complaint Reporting) system addresses this need.

The CCR system is a tool to improve Customer service, allowing the Customer service group to quickly respond and react to customer issues.

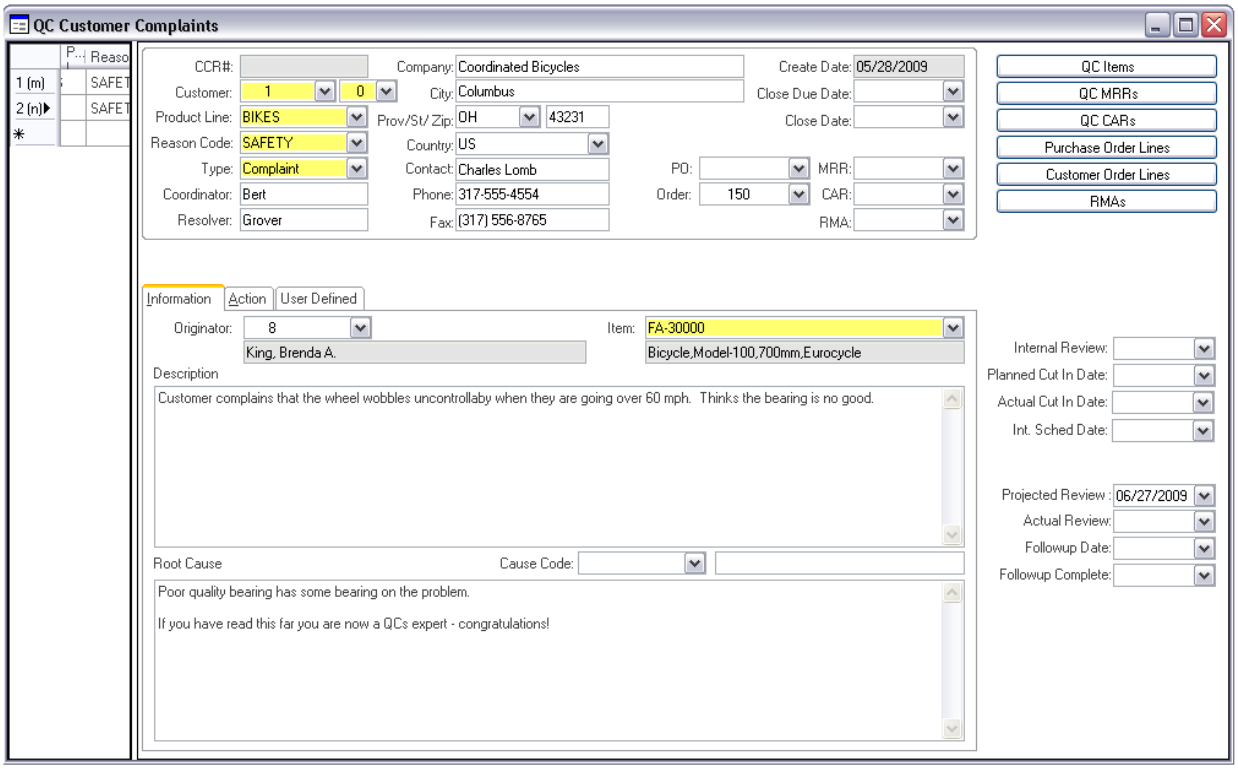
The Customer Complaint functionality is separate from all other QCS and SyteLine activities. There are neither material transactions nor accounting/financial or other 'activity' types of events that occur.

Customer Complaints

There are several components that make up the Customer Complaint Reporting system

1. CCR Security: Define who can create update and access CCRs
2. CCR Parameters. Customer review and followup days, validate customer, employee, and item. These are identified in the Customer Parameters in the QCS Setup manual
3. Product Line /Reason Code Responsibility table: This form is used to list Product lines and associated Reasons for the customer contact. The appropriate Coordinator and resolver may also be identified as defaults. The table is discussed in the QCS Setup manual
4. QC Customer Complaints: The main data entry screen for recording CCR information. The user can view all or filter to view specific CCRs
5. CCR Query: Lookup/filter CCRs
6. CCR Reports:
    - QC Customer Complaint Review Report
    - QC Customer Complaint Review Status Report

Customer Complaint - Fields



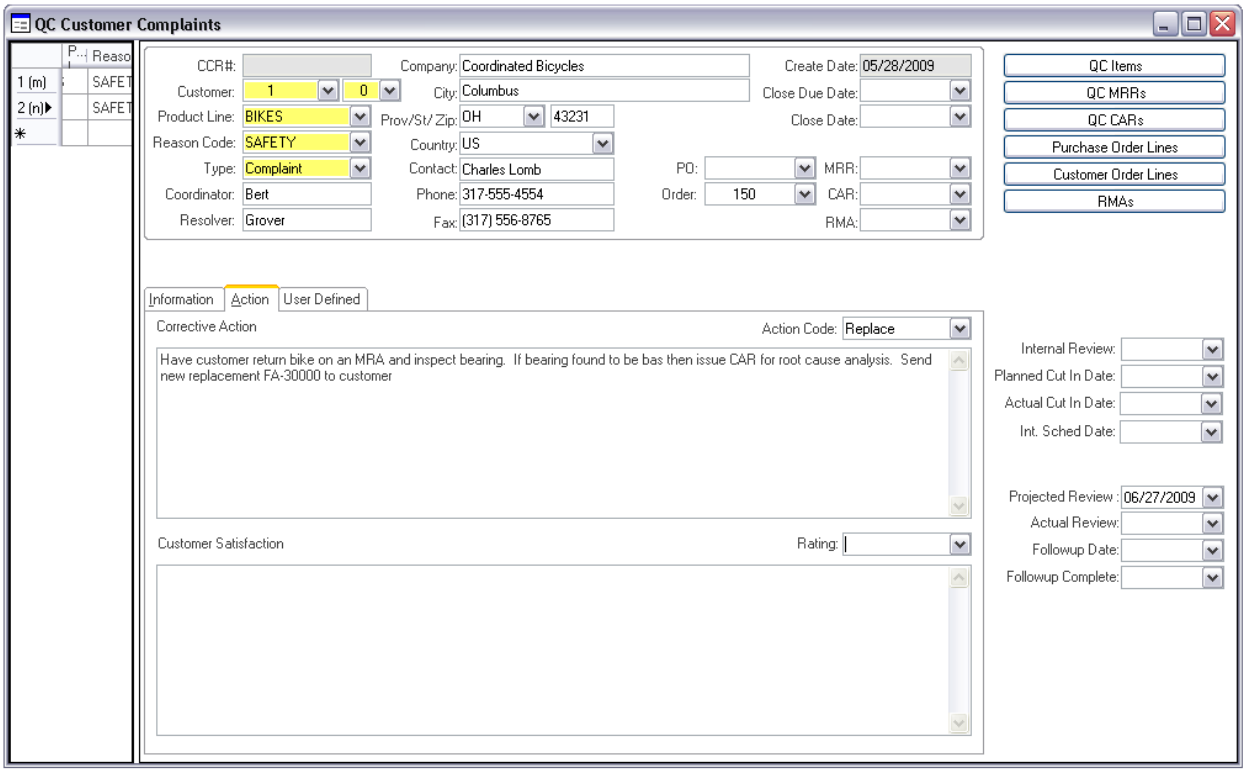
Field Descriptions:
Header

- CRR #: Automatically assigned in numeric sequence; maintained by CCR; cannot be edited by the user
- Customer: (Required) May or may not be linked to SL Customer, depends on Parameter setting
- Product Line: (Required)Lookup from the CCR Product line /Reason Code responsibility table
- Reason Code: (Required)Lookup from the CCR Product line /Reason Code responsibility table
- Type: (Required) Chose 1; Complaint, Feedback, Inquiry, Service, Suggestion
- Coordinator: Defaults from the CCR Product line /Reason Code responsibility table; editable
- Resolver: Defaults from the CCR Product line /Reason Code responsibility table; editable
- Company: May or may not be linked to SL Customer based on Parameter setting

- City: May or may not be linked to SL Customer based on Parameter setting
- Prov/State/Zip: May or may not be linked to SL Customer based on Parameter setting
- Country: May or may not be linked to SL Customer based on Parameter setting
- Contact: May or may not be linked to SL Customer based on Parameter setting
- Phone: May or may not be linked to SL Customer based on Parameter setting
- Fax: May or may not be linked to SL Customer based on Parameter setting
- Create Date: System generated. Default – today. Cannot be edited
- Close Due Date: Planned CCR Completion date
- Close Date: User selects a date to close the CCR

Information Tab

- Originator: If Validate parameter is set, must exist in SL employees; if not –freeform text
- Item: May or may not link with SL item, based on validate item parameter, may be blank
- Description: Text description of the complaint; entered by originator
- Root Cause: Text description
- Cause Code: Lookup from QCS ref type 'R' cause codes
- PO: Optional. Lookup from SL PO's
- Order: Optional. Lookup from SL CO's
- MRR: Optional. Lookup from existing QC MRRs
- CAR Num: Optional. Lookup from existing QC CARs
- RMA: Optional. Lookup from existing SL RMAs
- Int. Sched Date: Internal date the CCR is scheduled to be complete



Action Tab

- Corrective Action: Text description of what was/will be done to resolve the issue
- Action Code: Choose (1); Authorize return, credit, replace, rework & replace, miscellaneous
- Customer Satisfaction: Text description of customer satisfaction with resolution
- Rating: Chose (1); Not Satisfied, Poor, Average, Good, Excellent
- Internal Review: Date the internal review was completed
- Planned Cut in Date: Anticipated date of resolution
- Actual Cut in Date: Actual date of final resolution
- Projected Review: Planned CCR Review Date with Customer
- Actual Review: Date the CCR was communicated with the customer
- Projected Follow up: Planned date to follow up with the customer; default from parameters
- Follow up Complete: Date follow up actually completed

QC Customer Reports

- **QC Customer Certificate of Conformance**: A generic form that acknowledges that items shipped were manufactured, tested, and or inspected in compliance with applicable standards or requirements

- **QC Customer Available to Ship:** A list Open Customer Orders

- **QC Customer Item Inspection Status:** A listing by items & Customer with quantities Ordered, Shipped, Inventory available, QC Inspected available Quantity

- **QC Customer Final Inspection Worksheet:** List all required QC inspections & tests for an item

- **QC Item Report:** Listing of test and inspection criteria, and notes for QCS items

- **QC Transaction Report:** A listing of QCS transactions

- **QC Defect Distribution:** This report lists the failure codes and quantities that were entered against receivers.

- **QC Test Results:** A list of test results that were entered against receivers. Can be displayed for summary or individual test data

- **QC MRR Form**: Prints a MRR form; 1 page per MRR with information

- **QC MRR Status**: A summary of Material Review Reports selected

- **QC CAR Form:** Prints a CAR form; 1 page per CAR

- **QC CAR Status:** A summary of Corrective Action Requests selected

- **QC Customer RMA Reject Analysis Report**: List by Item/Customer of rejects from RMAs

- **QC Customer RMA Value of Inventory Report:** List of items and total value of Returns not yet dispostioned

- **QC Customer Complaint Review Report:** Prints the CCR Form

- **QC Customer Complaint Review Status Report:** A summary of CCRs

- **QC SPC Report:** This report calculates the Mean, Standard Deviation, C_p and C_{pk} for the last designated number of completed tests for an item.

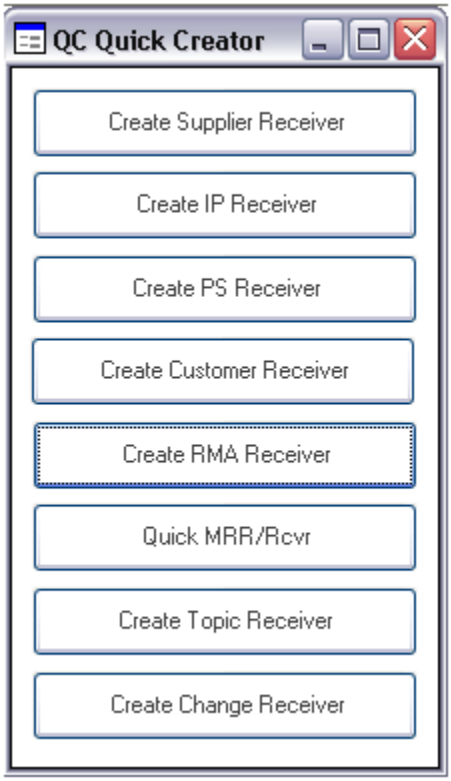
QCS Enterprise Section

QCS Enterprise Overview

The Quality Control Solution Enterprise module allows SyteLine users to track Quality Information that is associated with your Quality System, and is not directly associated with material. QCS Enterprise provides the functionality to track quality activities, actions and topics that are key to continuous improvement. QCS Enterprise also provides the ability to track changes to your processes, procedures and documents to ensure complete review and action. Each topic and change is created and then managed through to closure.

This section of the manual describes the activities needed to utilize the QCS Enterprise module. The setup of QCS, as defined in the QCS Setup section of this manual, must be completed prior to executing any procedures listed in this section.

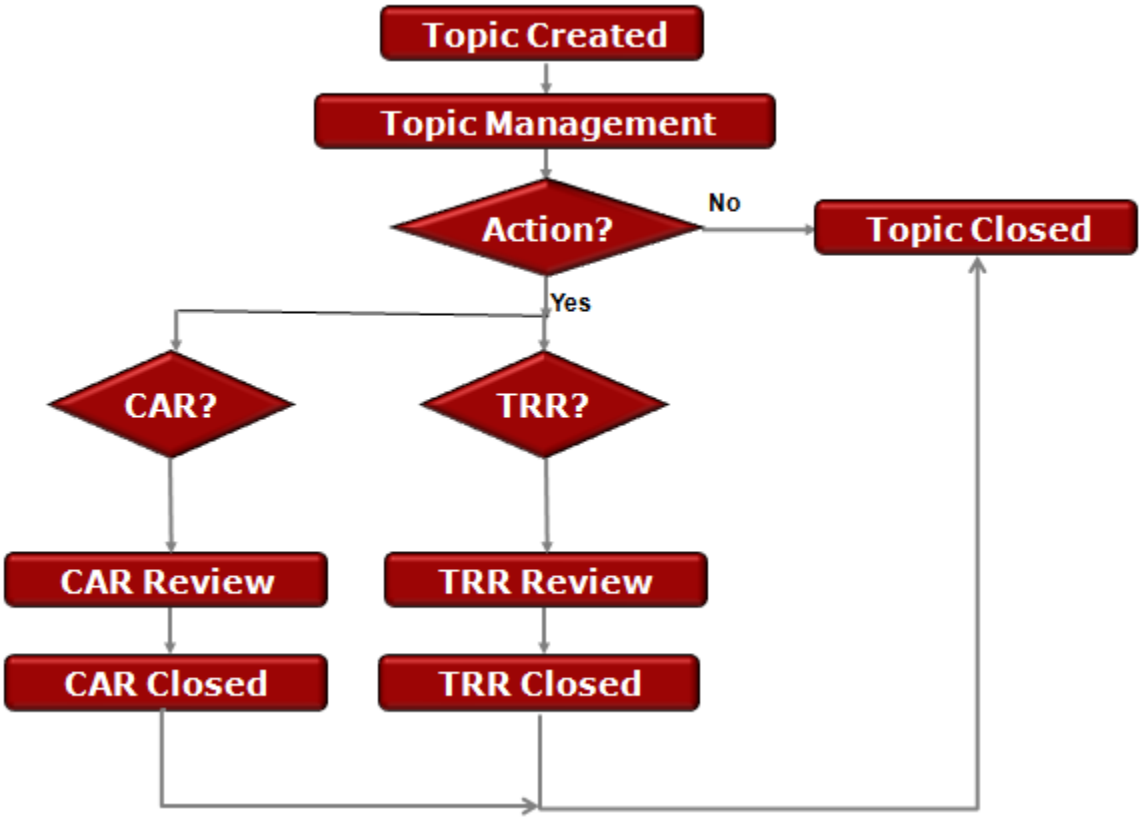
QC Quick Creator



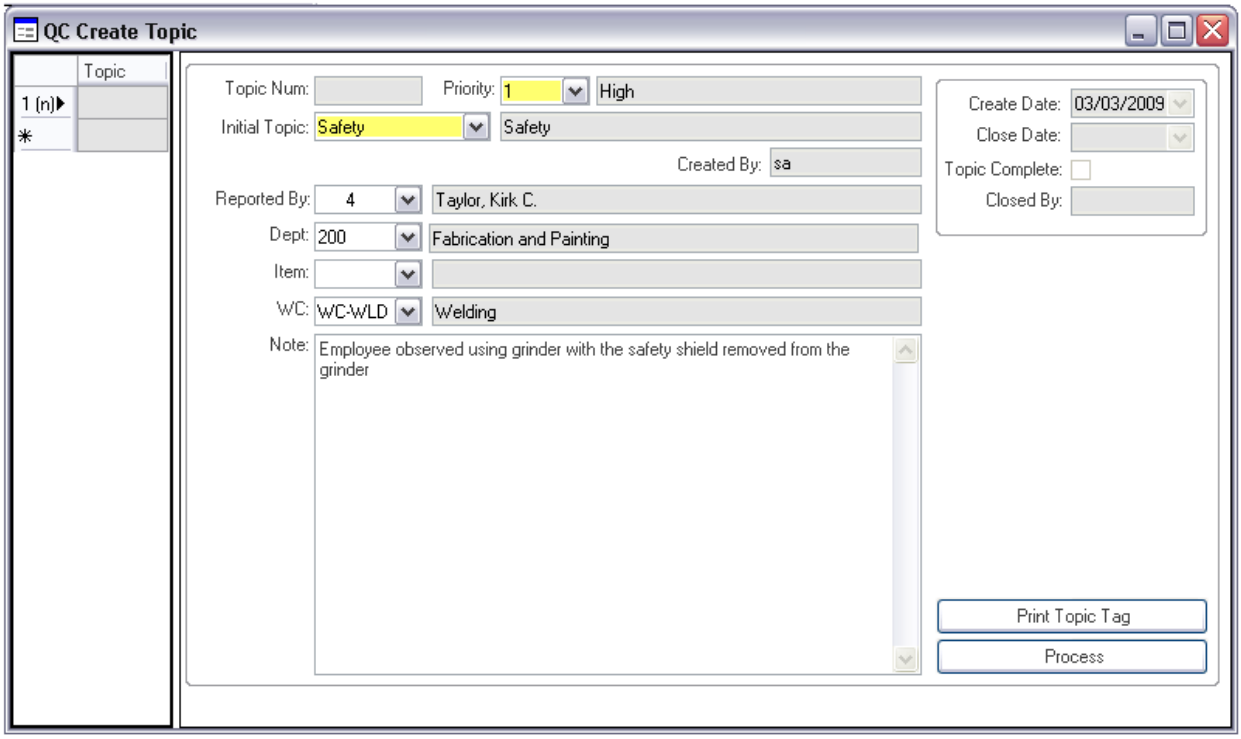
QC Quick Creator

Description: This form contains the following buttons which launch the corresponding Create Receiver utilities (utilities listed in ( ));

- Create Supplier Receiver (Supplier module)
- Create IP Receiver (IP module)
- Create PS Receiver (IP module)
- Create Customer Receiver (Customer module)
- Create RMA Receiver (Customer module)
- Quick MRR/Receiver (IP and Supplier modules)
- Create Topic Receiver (Enterprise module)
- Create Change Receiver (Enterprise module)


Topic Created
Topic Management
Action?
No
Topic Closed
Yes
CAR?
TRR?
CAR Review
TRR Review
CAR Closed
TRR Closed

QC Topic Creation



QC Topic Creation

DESCRIPTION: This form is used to create QC Topic Receivers. This form is used to create a basic Topic Receiver; which is then managed by the QC Topic Management form.
This form can be opened standalone or launched from the QC Quick Creator form.

Field Descriptions:
Header

- Topic Num (required): This field is populated by a system generated integer value.
- Priority (required): This dropdown list contains the QC Priorities collection. It defaults to a value of Low, but can be changed by the user prior to processing the record.
- Initial Topic (required): This dropdown list contains the QC Topic Types collection.
- Created By (read only): This field defaults to the SyteLine user name.
- Reported By ID (optional): This dropdown list contains the Employee collection.
- Dept (optional): This dropdown list contains the Department collection.

- Item (optional): This dropdown list contains the Items collection.
- WC (optional): This dropdown list contains the work center (WC) collection.
- Note: This is a multiline edit field to record additional information.

Create/Close information

- Create Date (read only): The date the Topic was created.
- Close Date (read only): The date the Topic was closed.
- Topics Complete (read only): Check box indicating if the Topic is closed
- Closed By (read only): SyteLine user name of the person who closed the Topic

Buttons:

- Print Topic Tag: This button prints the Topic tag.
- Process: This button saves a new Topic.

Activities:

Creating a Topic Receiver:

Press the New button on the SyteLine toolbar to create a new record.

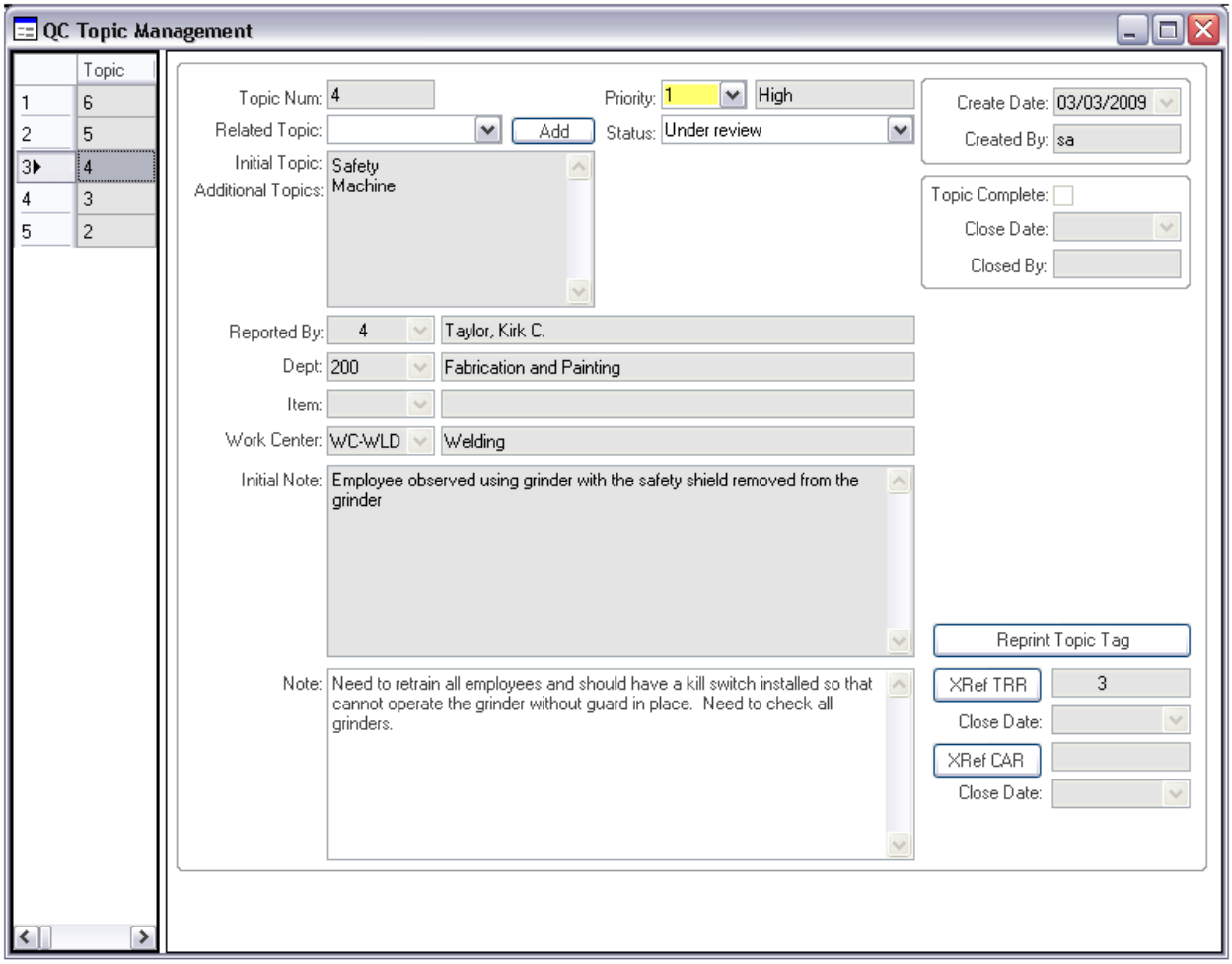
Printing a Topic Tag:

Press the Print Topic Tag button on the form to print a Topic tag.

Processing a Topic:

After filling in all the required fields as well as all desired optional fields, pressing the Process button will save the record and assign the Topic number. After creating and processing a request, all of the fields will become read only, as changes to a Topic Receiver must be made in the QC Topic Management form. However, you can still use the form to view existing Topic Receivers and to print additional tags if you wish.

QC Topic Management



QC Topic Management

DESCRIPTION: This form is used to manage QC Topic Receivers created in the QC Topic Creation form. The user may cross reference QC CAR and QC TRR documents from this form, as well as enter additional topic types, notes, and mark the Change Request as closed.

Field Descriptions:
Header

- Topic Num (required): This field is populated by the system generated number from the Topic creation.
- Priority (required): This dropdown list contains the QC Priority chosen by the user during Topic Creation, but can be changed.

- Related Topic (optional): This dropdown list contains the QC Topic Types collection. By selecting a Topic from the dropdown list and then selecting the Add button, multiple Topics can be listed in the Additional Topics box. Selecting and Adding additional Topics can be completed as many times as desired.
- Status (optional): This dropdown list contains the QC Status collection and can be used to assign/change the current status of the Topic.
- Initial Topic/Additional Topics (read only): This field contains the initial Topic chosen during the Topic creation as well as all additional Topics that were added through the Related Topic/Add field and button.
- Reported by (read only): This field contains the Employee entry collection selected during Topic creation (or blank if no selection was made).
- Dept (read only): This field contains the Department selected during the Topic creation (or blank if no selection was made).
- Item (read only): This field contains the Item selected during the Topic creation (or blank if no selection was made).
- Work Center (read only): This field contains the Work Center selected during the Topic creation (or blank if no selection was made).
- Initial Note (read only): This field contains the entry from the Notes field from Topic creation (or blank if no selection was made).
- Note (optional): This is a multiline edit field to record additional information.

Create/Close information

- Create Date (read only): The date the Topic was created
- Created By (read only): SyteLine System initials of the user who created the Topic
- Topic Complete: Check box indicating if the Topic is closed. Checking this box will make all fields on the form read only, and will have the system populate the Close Date and Closed By fields.
- Close Date (read only): The date the Topic was closed
- Closed By (read only): SyteLine System initials of the user who closed the Topic

Buttons:

- Reprint Topic Tag: This button will reprint the Topic tag that was created during Topic creation.
- XRef TRR: This button generates a QC TRR document. If the document already exists it will launch the QC TRR form. Once created the associated TRR number will appear in the field to the right of the button.
- Close Date Field (read only): When an XRef TRR has been closed the close date field will be filled in. The Topic cannot be closed if there is a TRR that has been created that is not closed.
- XRef CAR: This button generates a QC CAR document. If the document already exists it will launch the QC CAR form. Once created, the associated CAR number will appear in the field to the right of the button.
- Close Date Field (read only): When an XRef CAR has been closed, the close date field will be filled in. The Topic cannot be closed if there is a CAR that has been created that is not closed.

Activities:

Creating a QC TRR Document:

Press the XRef TRR button to create a new QC TRR record.

Creating a QC CMR Document:

Press the XRef CAR button to create a new QC CAR record.

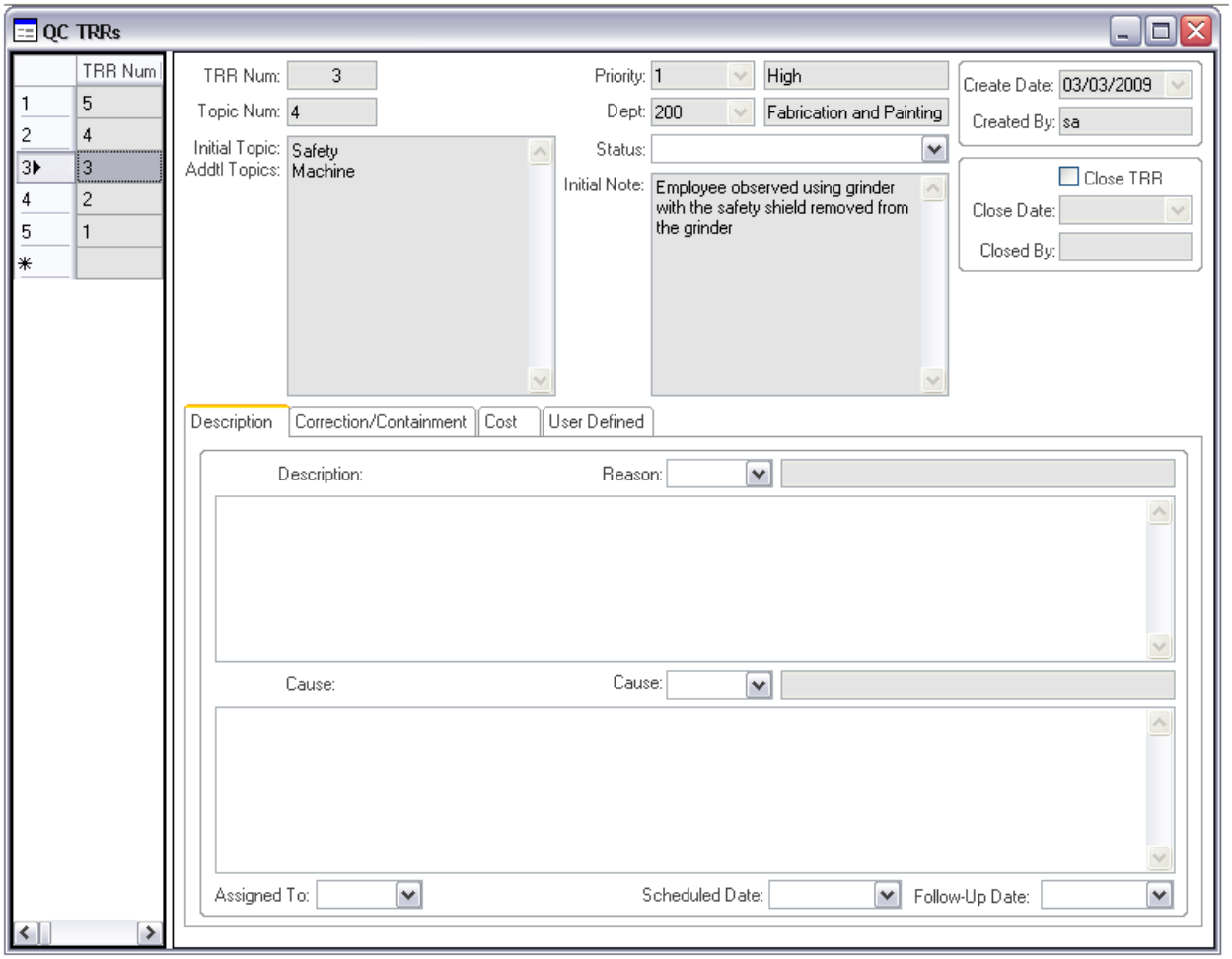
Printing a Topic Tag:

Press the Reprint Topic Tag button on the form to print a Topic tag.

Closing a Topic:

Clicking the Topic Complete checkbox will close a Topic. However, if you have cross referenced a QC TRR or QC CAR document, they must be closed before the Topic checkbox becomes enabled.

QC Topic Review Report (TRR)



QC Topic Review Report

DESCRIPTION: This form is used to action QC Topic Review Reports (TRR) created in the QC Topic Management Creation form.

Field Descriptions:
Header

- TRR Num (read only): This field is populated by the system generated number from the TRR creation (in the Topic Management form).
- Priority (read only): This dropdown list contains the QC Priority chosen by the user during Topic Creation.
- Topic Num (read only): This field is populated by the system generated number from the Topic creation (in the Topic Creation form).

- Dept (read only): This field is populated by the Department chosen by the user during Topic Creation (or blank if none was selected).
- Initial Topic/Add'l Topics (read only): This field contains the initial Topic chosen during the Topic creation as well as all additional Topics that were added in the Topic Management Form
- Status (optional): This dropdown list contains the QC Status collection
- Initial Note (read only): This field contains the initial note field as entered during Topic creation.

Create/Close information

- Create Date (read only): The date the TRR was created
- Created By (read only): SyteLine System initials of the user who created the Topic
- Close TRR: Check box indicating if the TRR is closed. Checking this box will make all fields on the form read only and will have the system populate the Close Date and Closed By fields
- Close Date (read only): The date the TRR was closed
- Closed By (read only): SyteLine System initials of the user who closed the TRR

Description Tab

- Description: User defined (400 characters). You may enter more than 400 characters however, the MRR only prints the first 3 lines.
- Reason: Select a reason code
- Cause of Defect: User defined (400 characters). You may enter more than 400 characters however, the MRR only prints the first 3 lines.
- Cause: Enter a code for the underlying problem which resulted in the MRR being created.
- Assigned to: User defined
- Scheduled Date: User defined
- Follow Up date: User defined

Correction/Containment Tab

- Correction/Containment: User defined (400 characters)
- Corrective Action: User defined (400 characters)
- Authorized by: If used, must be an employee number from SyteLine Employees

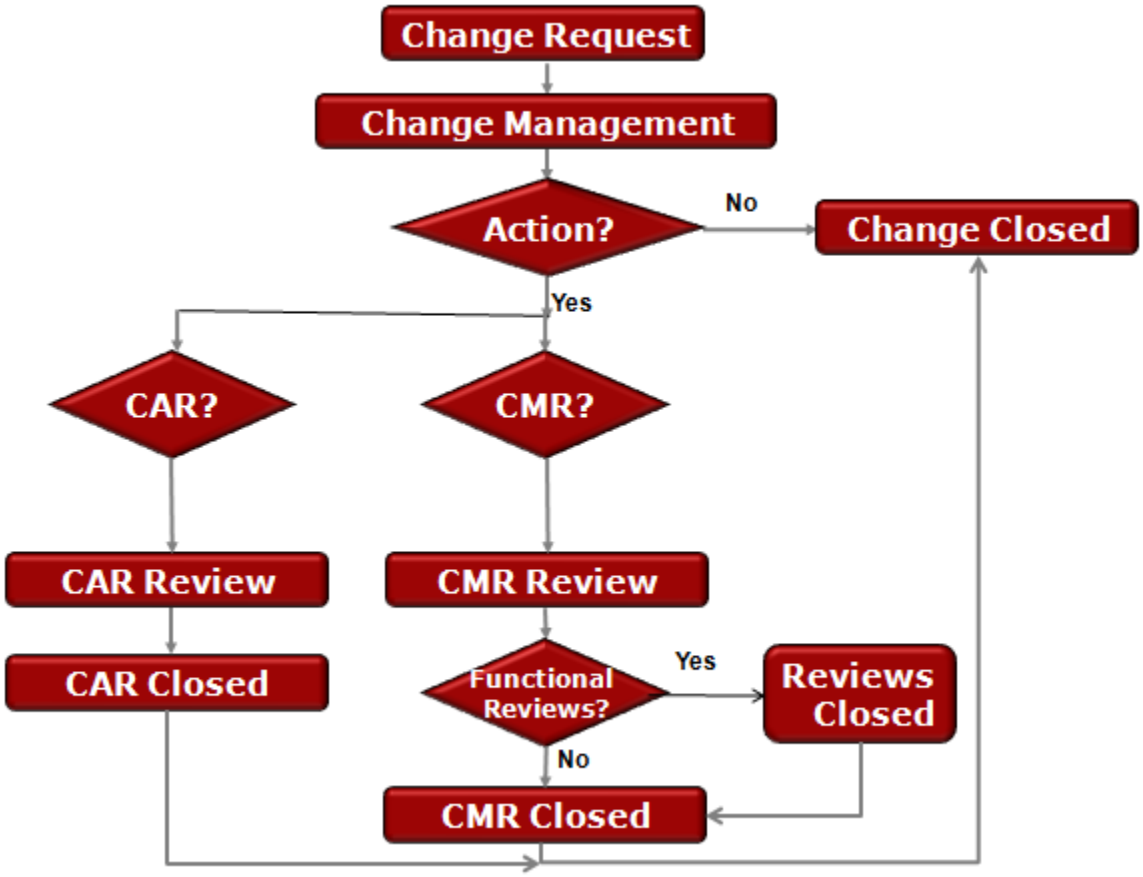
Cost Tab

- Seq: System-generated
- Action: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece
- Description: User defined
- Description: User defined

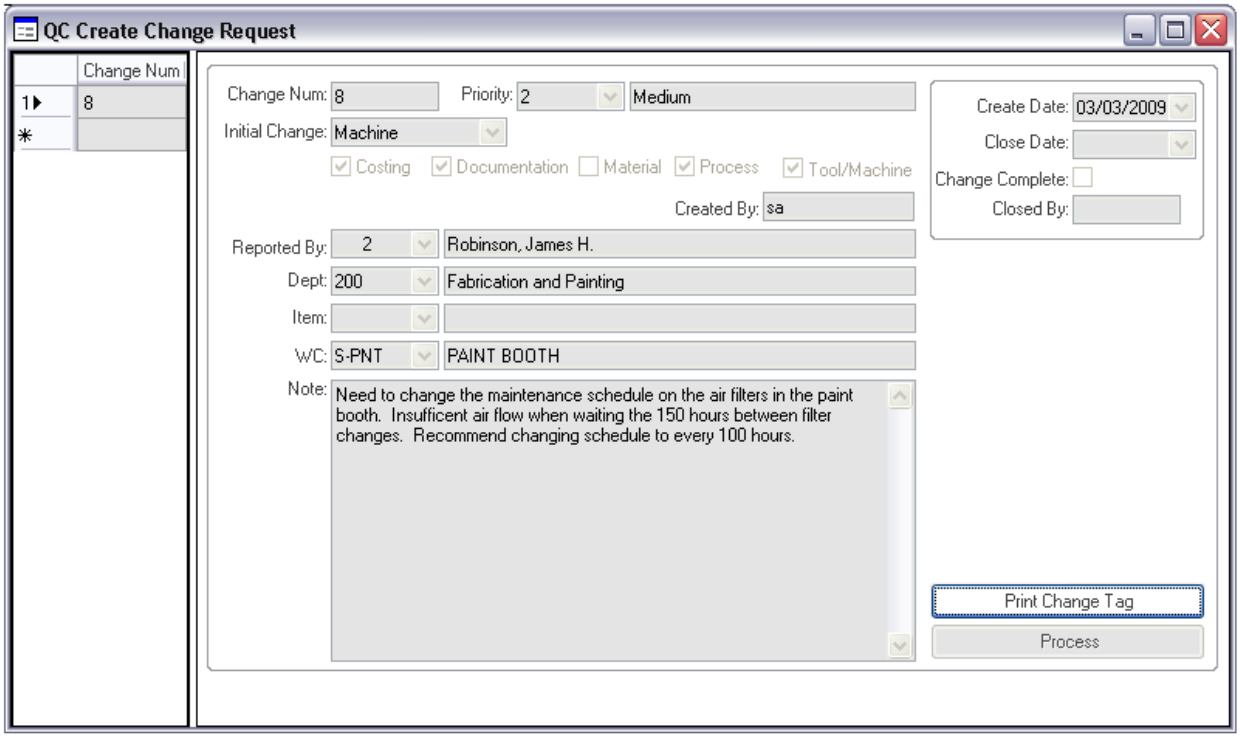
User Defined Tab

- Access to the standard Infor SyteLine 9.00 for QCS 9.00 user defined fields

QC Change Management



QC Change Request Creation



QC Create Change Request

DESCRIPTION: This form is used to create QC Change Request Receivers. The user uses this form to create a basic Change Request Receiver, which is then managed by the QC Change Request Management form.

This form can be opened standalone or launched from the QC Quick Creator form.

Field Descriptions:
Header

- Change Num (required): This field is populated by a system generated integer value.
- Priority (required): This dropdown list contains the QC Priorities collection. It defaults to a value of Low, but can be changed by the user prior to processing the record.
- Initial Change (required): This dropdown list contains the QC Change Types collection.
- Costing (read only): checkbox that shows if a costing functional review is required for the selected Change Type (Initial Change)
- Documentation (read only): checkbox that shows if a documentation functional review is required for the selected Change Type (Initial Change)

- Material (read only): checkbox that shows if a material functional review is required for the selected Change Type (Initial Change)
- Process (read only): checkbox that shows if a process functional review is required for the selected Change Type (Initial Change)
- Tool/Machine (read only): checkbox that shows if a tool/machine functional review is required for the selected Change Type (initial Change)
- Created By (read only): This field defaults to the SyteLine user name.
- Reported By ID (optional): This dropdown list contains the Employee collection.
- Dept (optional): This dropdown list contains the Department collection.
- Item (optional): This dropdown list contains the Items collection.
- WC (optional): this dropdown list contains the work center (WC) collection.
- Note: This is a multiline edit field to record additional information

Create/Close information

- Create Date (read only): The date the Change Request was created
- Close Date (read only): The date the Change Request was closed
- Change Complete (read only): Check box indicating if the Change Request is closed
- Closed By (read only): SyteLine user name of the person who closed the Change Request

Buttons:

- Print Change Tag: This button prints the Change tag.
- Process: This button saves a new Change Request.

Activities:

Creating a Change Request Receiver:

Press the New button on the SyteLine toolbar to create a new record.

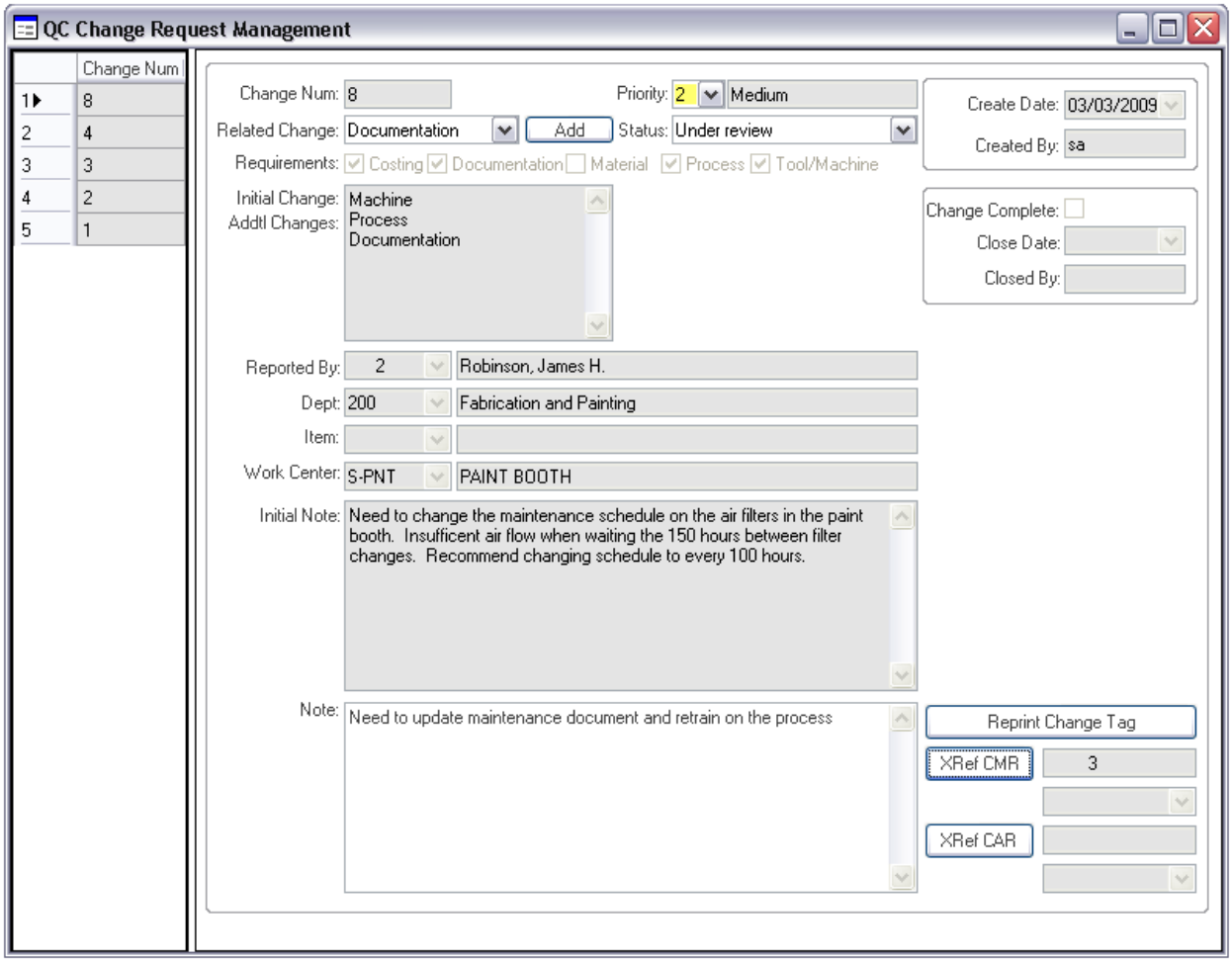
Printing a Change Tag:

Press the Print Change Tag button on the form to print a Change Request tag.

Processing a Change Request:

After filling in all the required fields as well as all desired optional fields, pressing the Process button will save the record and assign the Change number. After creating and processing a request, all of the fields will become read only, as changes to a Change Receiver must be made in the QC Change Management form. However, you can still use the form to view existing Change Receivers and to print additional tags if you wish.

QC Change Request Management



QC Change Request Management

DESCRIPTION: This form is used to manage QC Change Request Receivers created in the QC Change Request Creation form. The user may cross reference QC CAR and QC CMR documents from this form, as well as enter additional topic types, notes, and mark the Change Request as closed.

Field Descriptions:
Header

- Change Num (required): This field is populated by the system generated number from the Change Request creation.
- Priority (required): This dropdown list contains the QC Priority chosen by the user during Change Request Creation, but can be changed.

- Related Change (optional): This dropdown list contains the QC Change Types collection. By selecting a Change from the dropdown list and then selecting the Add button multiple Change Types can be listed in the Additional Changes box. Selecting and Adding additional Changes can be completed as many times as desired.

- Status (optional): This dropdown list contains the QC Status collection and can be used to assign/change the current status of the Topic.

- Requirements (read only): Shows if a functional area review is required. This is based on the initial change only. Possible functional areas include:

    - Costing (read only): checkbox that shows if a costing functional review is required for the selected Change Type (Initial Change)

    - Documentation (read only): checkbox that shows if a documentation functional review is required for the selected Change Type (Initial Change)

    - Material (read only): checkbox that shows if a material functional review is required for the selected Change Type (Initial Change)

    - Process (read only): checkbox that shows if a process functional review is required for the selected Change Type (Initial Change)

    - Tool/Machine (read only): checkbox that shows if a tool/machine functional review is required for the selected Change Type (initial Change)

- Initial Topic/Additional Changes (read only): This field contains the initial Change Type chosen during the Change Request creation, as well as all additional Change Types that were added through the Related Change/Add field and button.

- Reported by (read only): This field contains the Employee entry collection selected during Change Request creation (or blank if no selection was made).

- Dept (read only): This field contains the Department selected during the Change Request creation (or blank if no selection was made).

- Item (read only): This field contains the Item selected during the Change Request creation (or blank if no selection was made).

- Work Center (read only): This field contains the Work Center selected during the Change Request creation (or blank if no selection was made).

- Initial Note (read only): This field contains the entry from the Notes field from Change Request creation (or blank if no selection was made).

- Note (optional): This is a multiline edit field to record additional information

Create/Close information

- Create Date (read only): The date the Change Request was created
- Created By (read only): SyteLine System initials of the user who created the Change Request
- Change Complete: Check box indicating if the Change Request is closed. Checking this box will make all fields on the form read only, and will have the system populate the Close Date and Closed By fields
- Close Date (read only): The date the Change Request was closed
- Closed By (read only): SyteLine System initials of the user who closed the Change Reuqest

Buttons:

- Reprint Change Tag: This button will reprint the Change tag that was created during Change Request creation.
- XRef CMR: This button generates a QC CMR document (Change Management Review). If the document already exists it will launch the QC CMR form. Once created the associated CMR number will appear in the field to the right of the button.
- Close Date Field (read only): When an XRef'd CMR has been closed, the close date field will be filled in. The Change Request cannot be closed if there is a CMR that has been created that is not closed.
- XRef CAR: This button generates a QC CAR document. If the document already exists it will launch the QC CAR form. Once created the associated CAR number will appear in the field to the right of the button.
- Close Date Field (read only): When an XRef'd CAR has been closed, the close date field will be filled in. The Change Request cannot be closed if there is a CAR that has been created that is not closed.

Activities:

Creating a QC CMR Document:

Press the XRef CMR button to create a new QC CMR record.

Creating a QC CAR Document:

Press the XRef CAR button to create a new QC CAR record.

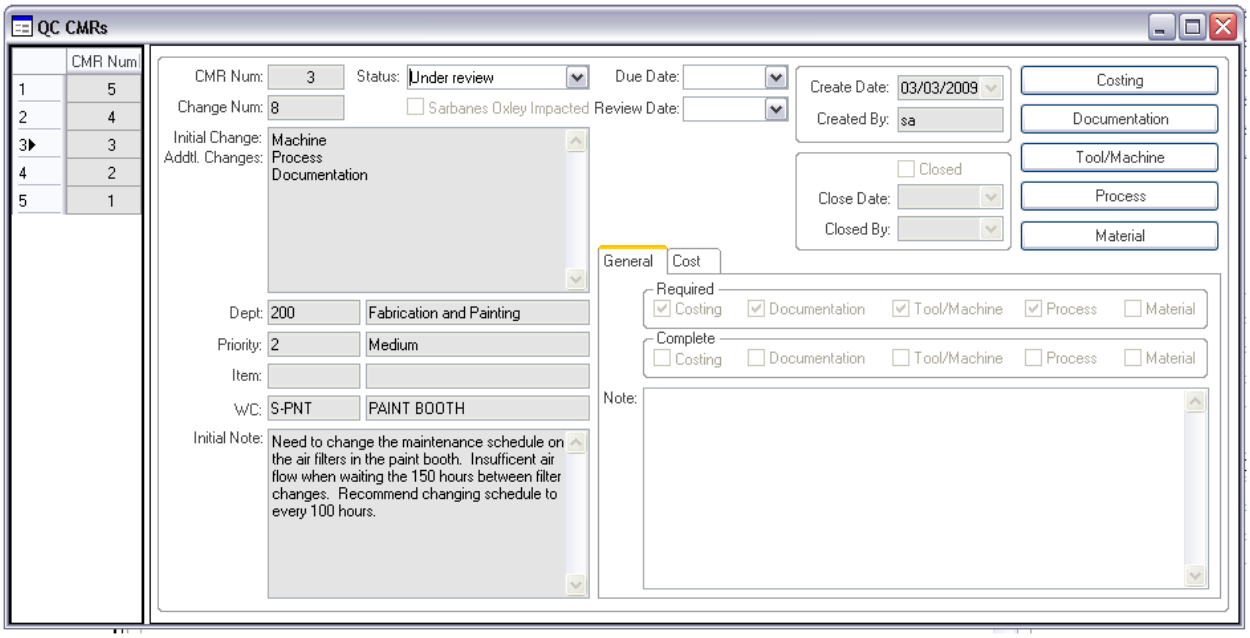
Printing a Change Tag:

Press the Reprint Change Tag button on the form to print a Change Tag.

Closing a Change Request:

Clicking the Change Complete checkbox will close a Change Request. However, if you have cross referenced a QC CMR or QC CAR document, they must be closed before the Change Complete checkbox becomes enabled.

QC CMRs



QC CMR

DESCRIPTION: This form is used to manage QC CMRs created in the QC Change Management form. The user will complete required components of the change type chosen during Change Receiver Creation, as well as enter additional notes, costs, and mark the CMR as closed.

Field Descriptions:
Header

- CMR Num (read only): This field is populated by the system generated number from the CMR creation (in the Change Management form).
- Status (optional): this dropdown list contains the QC Status collection
- Due Date (optional): User defined
- Change Num (read only): This field is populated by the system generated number from the Change creation (in the Change Creation form).
- Sarbanes Oxley Impacted (optional): This checkbox can be checked to designate that a change may impact Sarbanes Oxley required auditing and reporting.
- Review Date (optional): User defined

- Initial Change/Add'l Changes (read only): This field contains the initial Change chosen during the Change Request creation as well as all additional Changes that were added in the Change Management Form.
- Initial Note (read only): This field contains the initial note field as entered during Change Request creation.

Create/Close information

- Create Date (read only): The date the CMR was created
- Created By (read only): SyteLine System initials of the user who created the CMR
- Closed: Check box indicating if the CMR is closed. Checking this box will make all fields on the form read only, and will have the system populate the Close Date and Closed By fields.
- Close Date (read only): The date the CMR was closed
- Closed By (read only): SyteLine System initials of the user who closed the CMR

General Tab

- Required (read only): check box listing of functional areas selected in the Change Types Form for the initial Change Type selected Selections include:
  - Costing (read only): checkbox that shows if a costing functional review is required for the selected Change Type (Initial Change)
  - Documentation (read only): checkbox that shows if a documentation functional review is required for the selected Change Type (Initial Change)
  - Material (read only): checkbox that shows if a material functional review is required for the selected Change Type (Initial Change)
  - Process (read only): checkbox that shows if a process functional review is required for the selected Change Type (Initial Change)
  - Tool/Machine (read only): checkbox that shows if a tool/machine functional review is required for the selected Change Type (initial Change)
- Complete (read only): checkbox listing of functional areas that have been marked as completed (same areas as under Required). If a functional area is required then the Complete must also be checked as completed before the CMR can be closed.
- Note (optional): User defined multiline edit field

Cost Tab

- Seq: System-generated
- Action: Specific activity/cost associated with the non-conformance, checked against QC Cost Activity Table
- Cost Type: General QC Cost category, checked against QC Cost Type table
- Qty: Typically references hours or number of pieces
- Unit Cost: Typically dollars per hour or dollars per piece
- Description: User defined
- Description: User defined

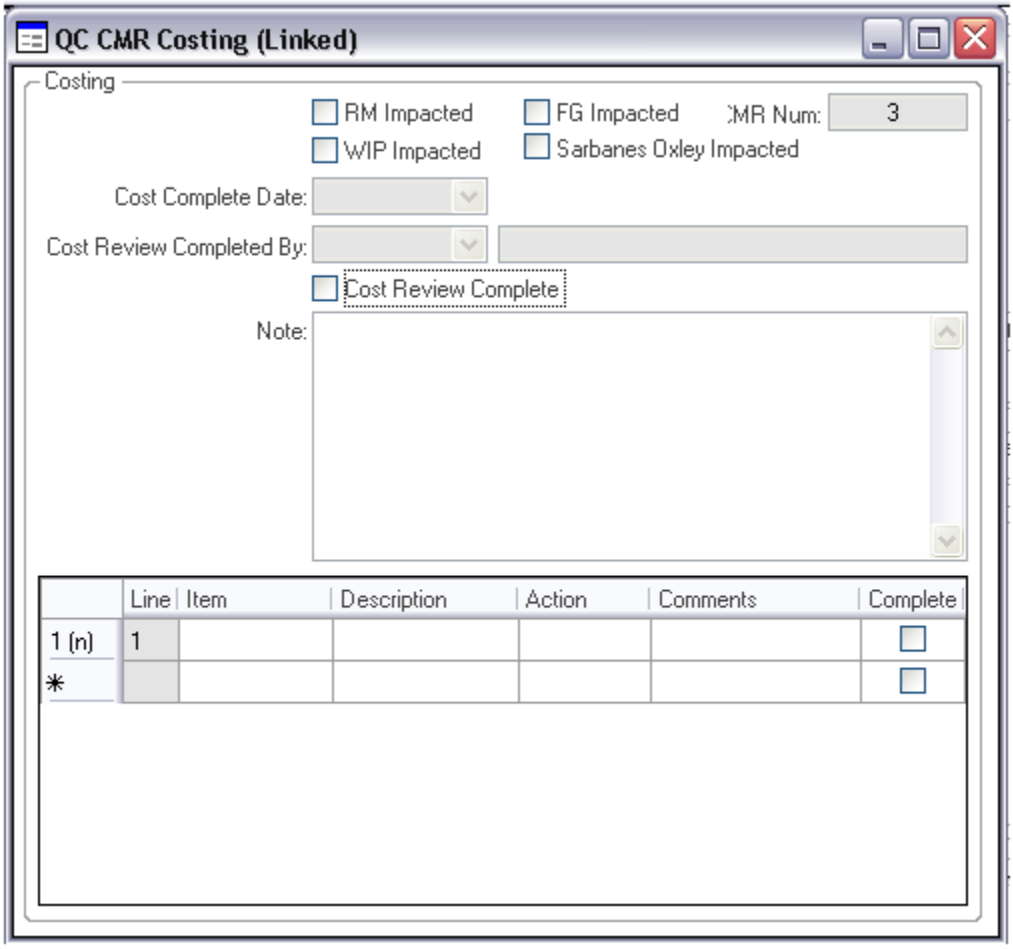
Buttons:

- Costing: Opens the Costing functional review form
- Documentation: Opens the Costing documentation review form
- Tool/Machine: Opens the Tool/Machine functional review form
- Process: Opens the Process functional review form
- Material: Opens the Material functional review form

Activities:

Closing a QC CMR Document:

A CMR document cannot be closed until all of the required change attributes in the Required group box are fulfilled in the Complete group box. The user can complete these attributes by clicking on the corresponding button to launch the associated form for that specific change attribute.



QC CMR Costing

DESCRIPTION: This form is used to record costing data if the QC CMR Change Type requires a Cost Review. The user can record various ways costing is impacted, as well as enter additional notes, CMR Impact records, and mark the Costing change component as complete.

Field Descriptions:

Header

- RM Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact Raw Materials
- FG Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact Finished Goods

- CMR Num (read only): This field is populated with the CMR number
- WIP Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact Work In Process
- Sarbanes Oxley Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact Sarbanes Oxley requirements
- Cost Complete Date (read only): Date the Cost review is closed
- Cost Review Completed By (read only): SyteLine System employee name of the user who closed the Cost Review
- Cost Review Complete: Check box used to mark the Cost Review as closed. Must be checked to close functional Review.
- Note (optional): User entered notes on cost functional area review

Costing Impacts grid:

This grid provides numerous fields to allow the user to record the specific details of factors impacting costing. These fields are all text entry, with the exception of a checkbox to indicate that the impact is complete.

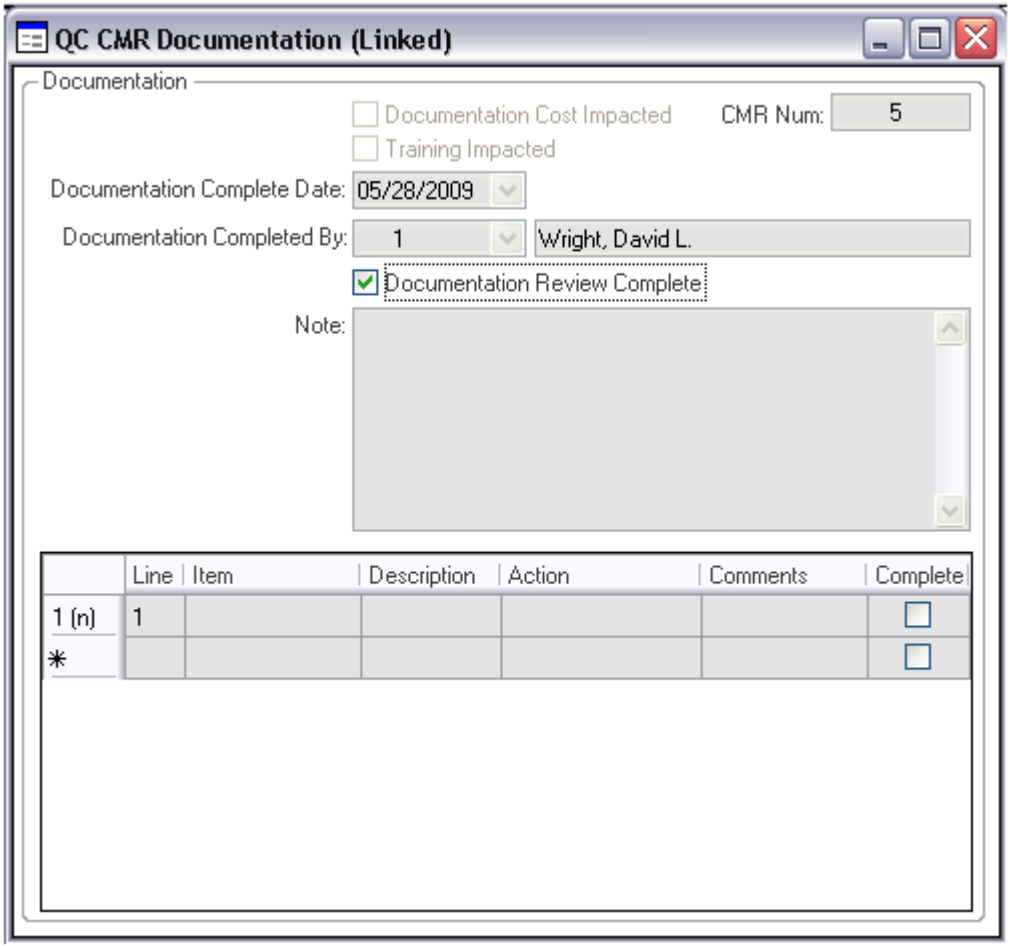
- Line (read only): Auto-generated Impact line number
- Description: Text entry field
- Action: Text entry field
- Comments: Text entry field
- Complete: Check box to mark the line as complete

Activities:

Closing a QC CMR Cost Review:

A CMR document cannot be closed until all of the required change attributes in the Required group box are fulfilled in the Complete group box. Closing the Cost Review will disable the data entry fields, and mark Costing complete on the main CMR form.

QC CMR Documentation



QC CMR Documentation

DESCRIPTION: This form is used to record documentation data if the QC CMR Change Type requires a Documentation Review. The user can record various ways documentation is impacted, as well as enter additional notes, CMR Impact records, and mark the Documentation change component as complete.

Field Descriptions:
Header

- Documentation Cost Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact costs
- Training Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact training requirements
- CMR Num (read only): This field is populated with the CMR number.

- Documentation Complete Date (read only): Date the Documentation review is closed
- Documentation Completed By (read only): SyteLine System employee name of the user who closed the Documentation Review
- Documentation Review Complete: Check box used to mark the Documentation Review as closed. Must be checked to close functional Review.
- Note (optional): User entered notes on documentation functional area review

Documentation Impacts grid:

This grid provides numerous fields to allow the user to record the specific details of factors impacting documentation; this may include listing specific documentation that needs to be revised. These fields are all text entry, with the exception of a checkbox to indicate that the impact is complete.

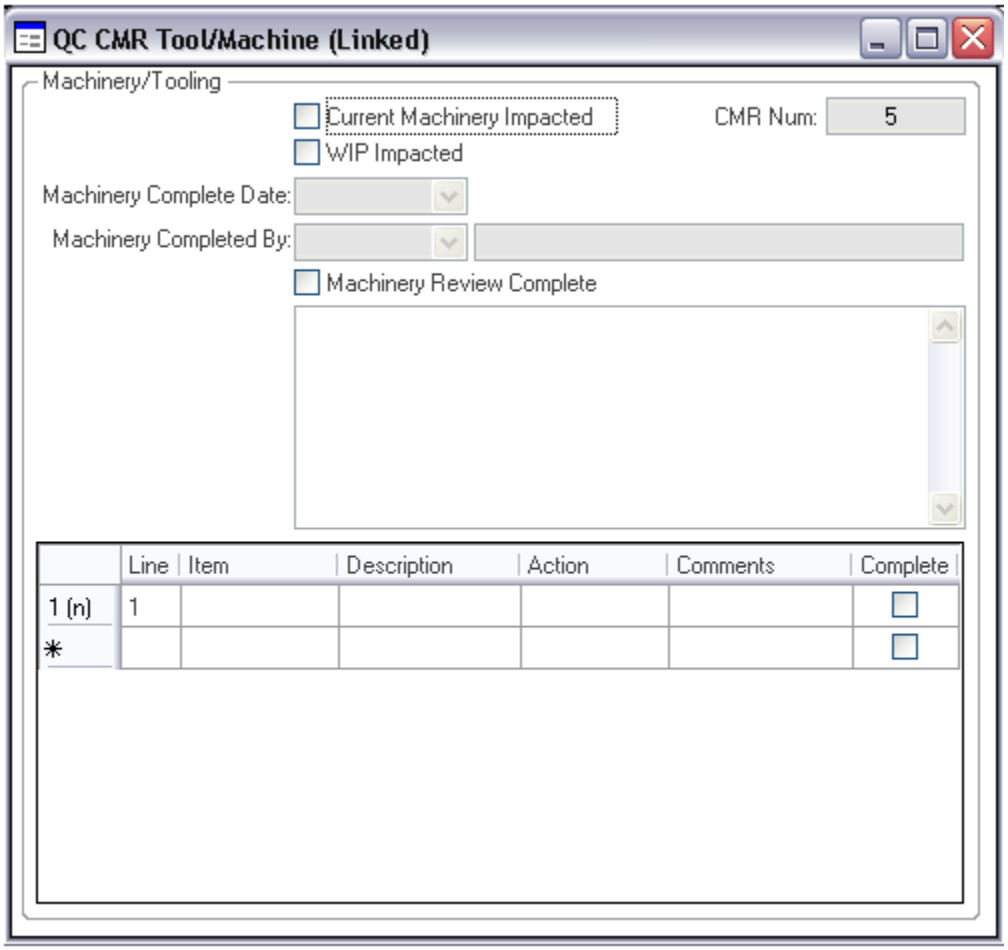
- Line (read only): Auto-generated Impact line number
- Description: Text entry field
- Action: Text entry field
- Comments: Text entry field
- Complete: Check box to mark the line as complete

Activities:

Closing a QC CMR Documentation Review:

A CMR document cannot be closed until all of the required change attributes in the Required group box are fulfilled in the Complete group box. Closing the Documentation Review will disable the data entry fields, and mark Documentation complete on the main CMR form.

QC CMR Tool/Machine



QC CMR Tool/Machine

DESCRIPTION: This form is used to record machinery and tooling data if the QC CMR Change Type requires a Tool/Machine Review. The user can record various ways costing is impacted, as well as enter additional notes, CMR Impact records, and mark the Tool/Machine change component as closed.

Field Descriptions:
Header

- Current Machinery Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may machinery
- WIP Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact Work In Process
- CMR Num (read only): This field is populated with the CMR number.

- Machinery Complete Date (read only): Date the Machinery/Tooling review is closed
- Machinery Completed By (read only): SyteLine System employee name of the user who closed the Machinery/Tooling Review
- Machinery Review Complete: Check box used to mark the Machinery/Tooling Review as closed. Must be checked to close functional Review.
- Note (optional): User entered notes on Machinery/Tooling functional area review

Documentation Impacts grid:

This grid provides numerous fields to allow the user to record the specific details of factors impacting documentation; this may include listing specific documentation that needs to be revised. These fields are all text entry, with the exception of a checkbox to indicate that the impact is complete.

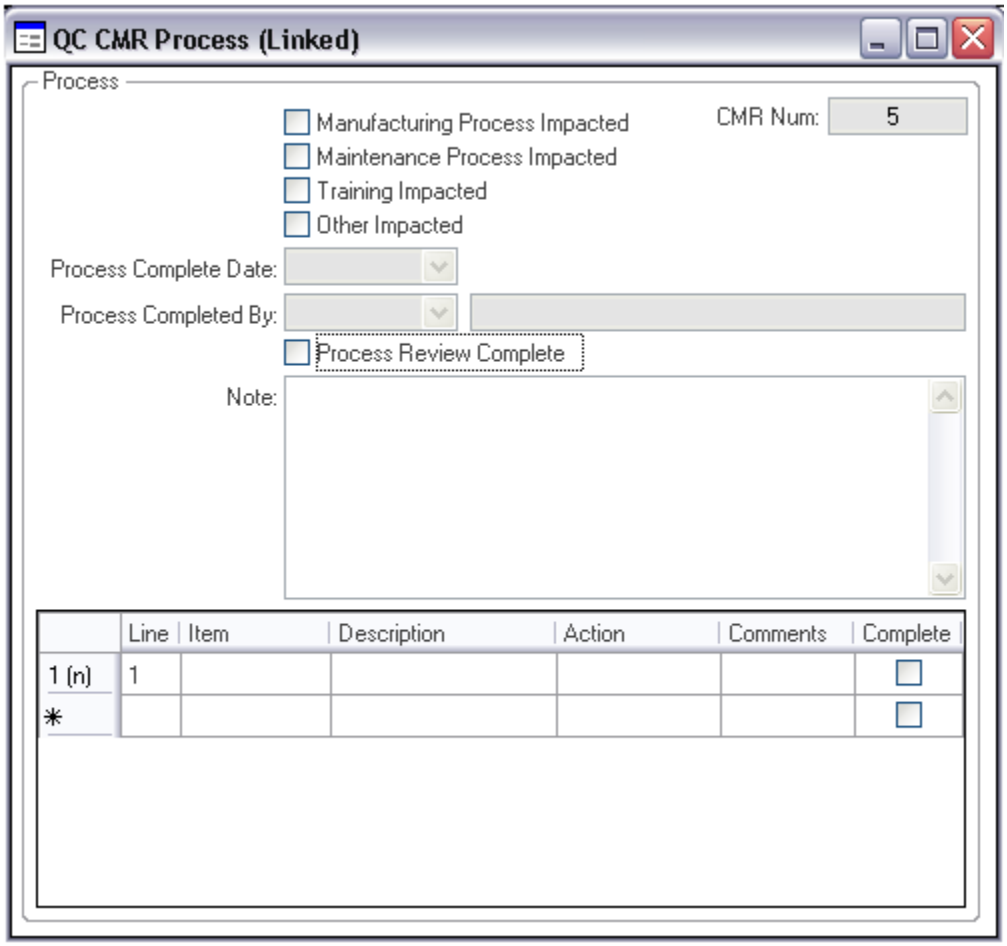
- Line (read only): Auto-generated Impact line number
- Description: Text entry field
- Action: Text entry field
- Comments: Text entry field
- Complete: Check box to mark the line as complete

Activities:

Closing a QC CMR Cost Review:

A CMR document cannot be closed until all of the required change attributes in the Required group box are fulfilled in the Complete group box. Closing the Cost Review will disable the data entry fields, and mark Tool/Machine complete on the main CMR form.

QC CMR Process



QC CMR Process

DESCRIPTION: This form is used to record Process data if the QC CMR Change Type requires a Process Review. The user can record various ways process is impacted, as well as enter additional notes, CMR Impact records, and mark the Process change component as closed.

Field Descriptions:
Header

- Manufacturing Process Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact manufacturing process(s)
- Maintenance Process Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact maintenance procedure(s)

- Training Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact training)
- Other Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact any other process as user defined
- CMR Num (read only): This field is populated with the CMR number.
- Process Complete Date (read only): Date the Process review is closed
- Process Completed By (read only): SyteLine System employee name of the user who closed the Process Review
- Process Review Complete: Check box used to mark the Process Review as closed. Must be checked to close functional Review.
- Note (optional): User entered notes on documentation functional area review

Documentation Impacts grid:

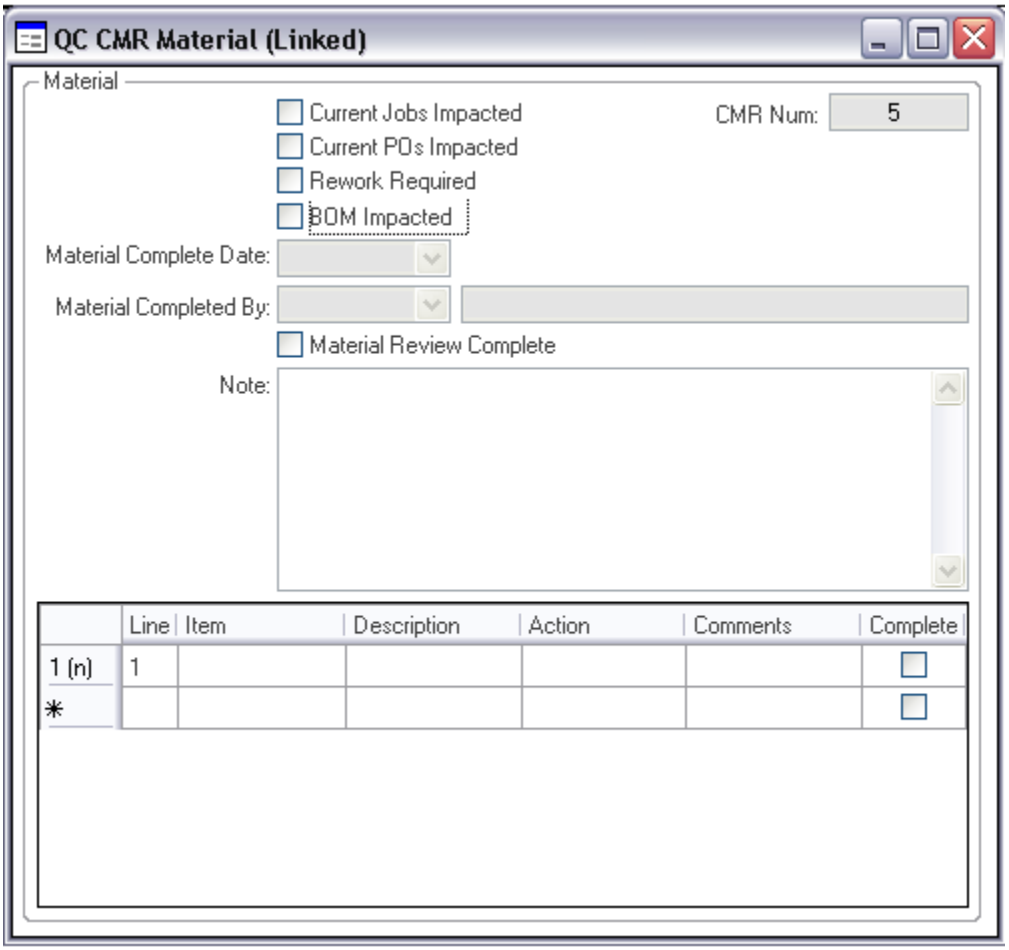
This grid provides numerous fields to allow the user to record the specific details of factors impacting Process(s) this may include listing specific documentation that needs to be revised. These fields are all text entry, with the exception of a checkbox to indicate that the impact is complete.

- Line (read only): Auto-generated Impact line number
- Description: Text entry field
- Action: Text entry field
- Comments: Text entry field
- Complete: Check box to mark the line as complete

Activities:

Closing a QC CMR Process Review:

A CMR document cannot be closed until all of the required change attributes in the Required group box are fulfilled in the Complete group box. Closing the Process Review will disable the data entry fields, and mark Process complete on the main CMR form.



QC CMR Material

DESCRIPTION: This form is used to record costing data if the QC CMR Change Type requires a Material Review. The user can record various ways materials are impacted, as well as enter additional notes, CMR Impact records, and mark the Material change component as closed.

Field Descriptions:
Header

- Current Jobs Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact current released jobs

- Current POs Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact released and/or planned Purchase orders
- Rework Required (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may require rework
- BOM Impacted (optional): Check box to provide ease of filtering/reporting. Checked if the change will/may impact any Bill of Material(s)
- CMR Num (read only): This field is populated with the CMR number
- Material Complete Date (read only): Date the Material review is closed
- Material Completed By (read only): SyteLine System employee name of the user who closed the Material Review
- Material Review Complete: Check box used to mark the Material Review as closed. Must be checked to close functional Review.
- Note (optional): User entered notes on Material functional area review

Documentation Impacts grid:

This grid provides numerous fields to allow the user to record the specific details of factors impacting Material(s). This may include listing specific materials that are impacted. These fields are all text entry, with the exception of a checkbox to indicate that the impact is complete.

- Line (read only): Auto-generated Impact line number
- Description: Text entry field
- Action: Text entry field
- Comments: Text entry field
- Complete: Check box to mark the line as complete

Activities:

Closing a QC CMR Process Review:

A CMR document cannot be closed until all of the required change attributes in the Required group box are fulfilled in the Complete group box. Closing the Material Review will disable the data entry fields, and mark Material complete on the main CMR form.

QA Process Flows

The QA Process Flow functionality that is built into the QCS Enterprise module is designed to provide a consistent methodology and reporting structure for any process that is repeated in an organization. The Process functionality is designed to be used to document quality in any process, and can be used for any process including those not typically associated with quality activities.

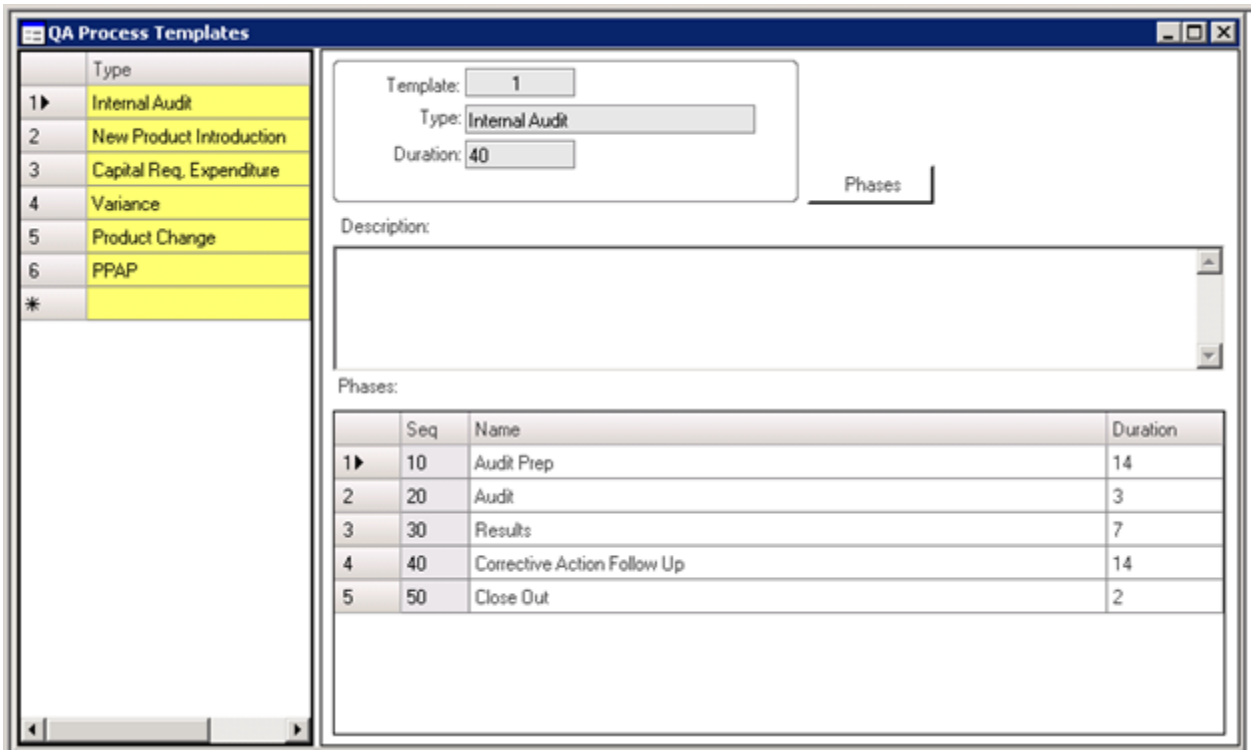
The QA Process has the following advantages:

- 100% contained within SyteLine so there are no separate logins or databases
- Utilizes the SyteLine toolkit
    - Notes functionality
    - Event System capabilities
    - Ability to assign permissions
    - Filtering and look up capabilities

The QA Process consists of the main sections that combine to give the full functionality. These are:

1. Process
2. Phases
3. Phase Activities

QA Process Templates

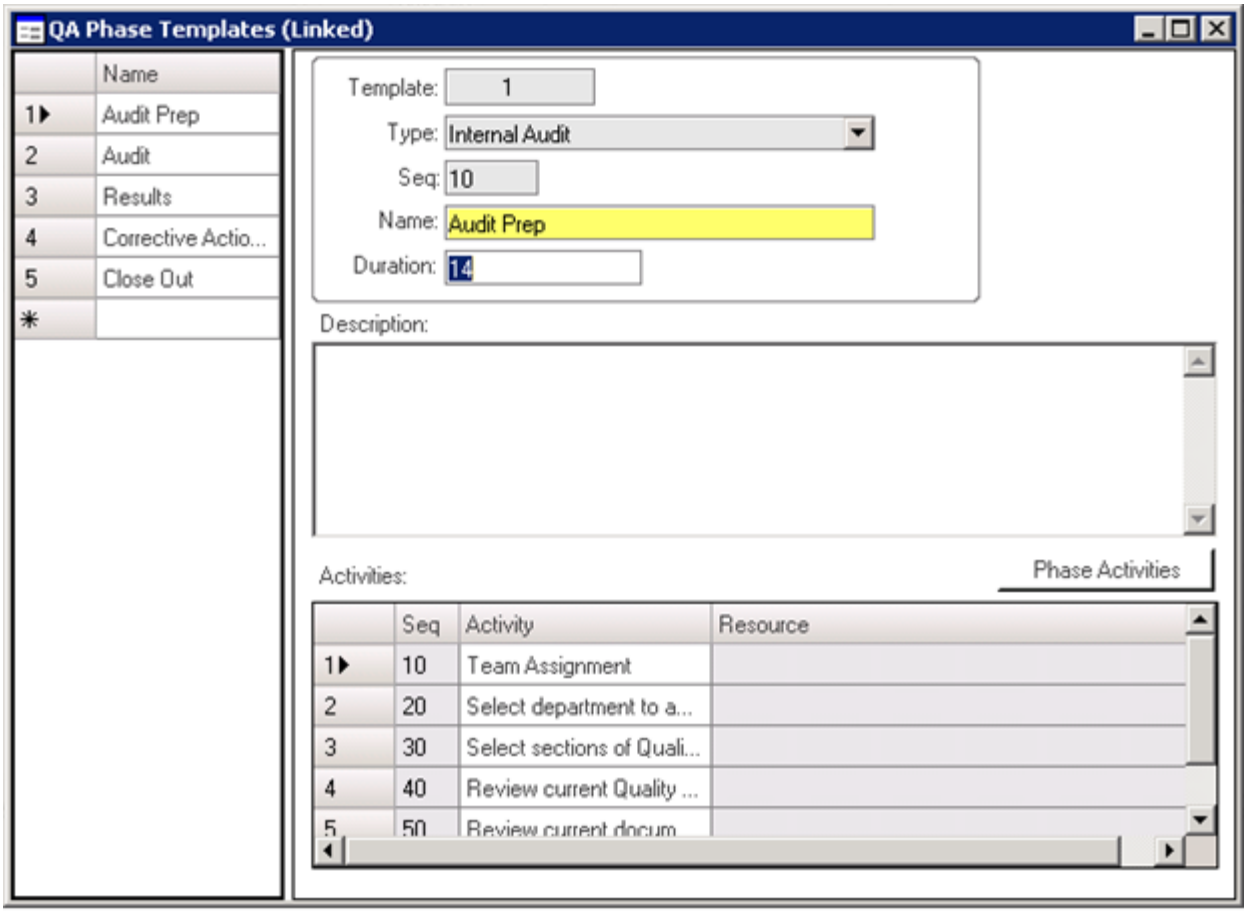


DESCRIPTION: QA Process Templates are the basis for generated Process Flows.

Field Descriptions:

- Template: This is a system generated unique number for each process template to identify the template.
- Type: User defined - this is the common name for the process that is being created.
- Duration: This is a read only field and will be the sum in days of all durations for all phases associated with the Process template.
- Phases Button: This button is used to open the QA Phase Template form (linked).

QA Process Phase Templates



DESCRIPTION: A QA Process Flow consists of one or more QA Phases. This is based on a Phases and Gates Project management system where a Process is made up of sequential phases. The QA Phase Template form is used to define the collection of Phases that comprise a Process Flow.

Field Descriptions:

- Template: Read only - this is the system generated unique number for the Process.
- Type: Read only - this is Process name assigned to the Process in the Process template.

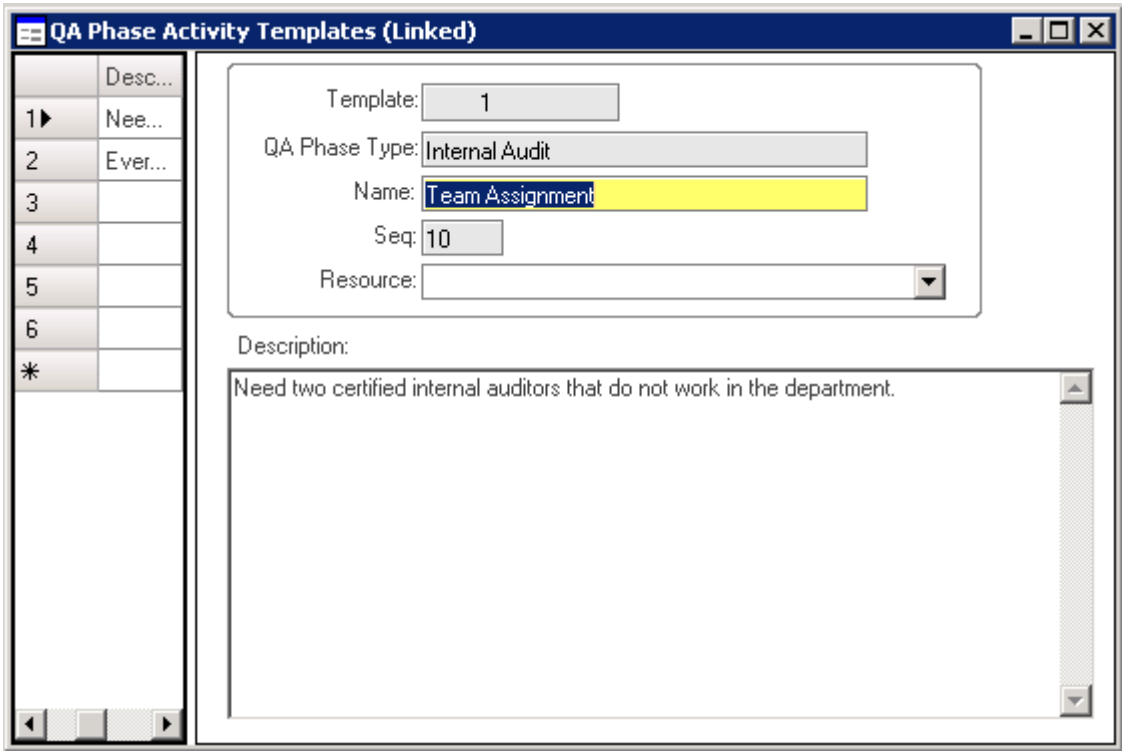
- Seq: Read only – this is a system generated number that defines the order of the phases associated with a Process.

- Name: The name of the specific phase

- Duration: entered in calendar days. This is the planned duration for all activities associated with the phase. The sum of all phase durations is used to populate the duration field on the Process template.

- Phase Activities Button: This button is used to open the QA Phase Activities form (linked).

QA Process Phase Activity Templates



DESCRIPTION: QA Phase Activity Templates detail the steps or components of a QA Phase Template. They are linked to the Process and Phase Templates by template number and Phase Type. These are the specific activities that must be completed for a phase to be completed.

Field Descriptions:

- Template: Read only - this is the system generated unique number for the Process.

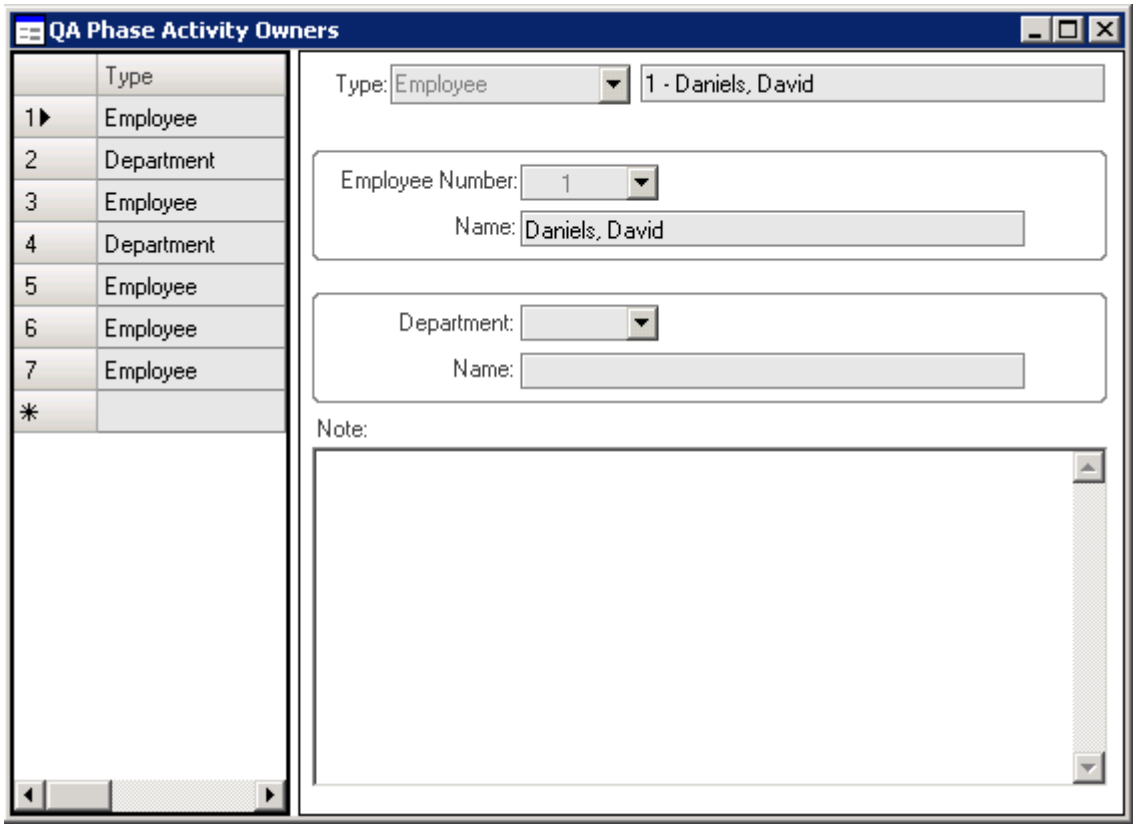
- QA Phase Type: Read only - this is Phase name assigned to the Process in the Phase template.

- Name: The name of the specific activity that is being created for the phase.

- Seq: Read only – this is a system generated number that identifies various activities associated with a Phase.

- Resource: If Process Resources have been created utilizing the QA Phase Activity Owners form (see page *344*), then this drop down field will list all of these resources and a specific resource can be identified for the phase activity.

QA Process Phase Activity Owners



DESCRIPTION: The QA Process Phase Activity Owners form is used to create a resource table that contains both employees, as well as departments that can then be assigned to specific QA Phase Activities if desired. A new record is created in this form for every resource that will be designated for QA Phase Activities.

Field Descriptions:

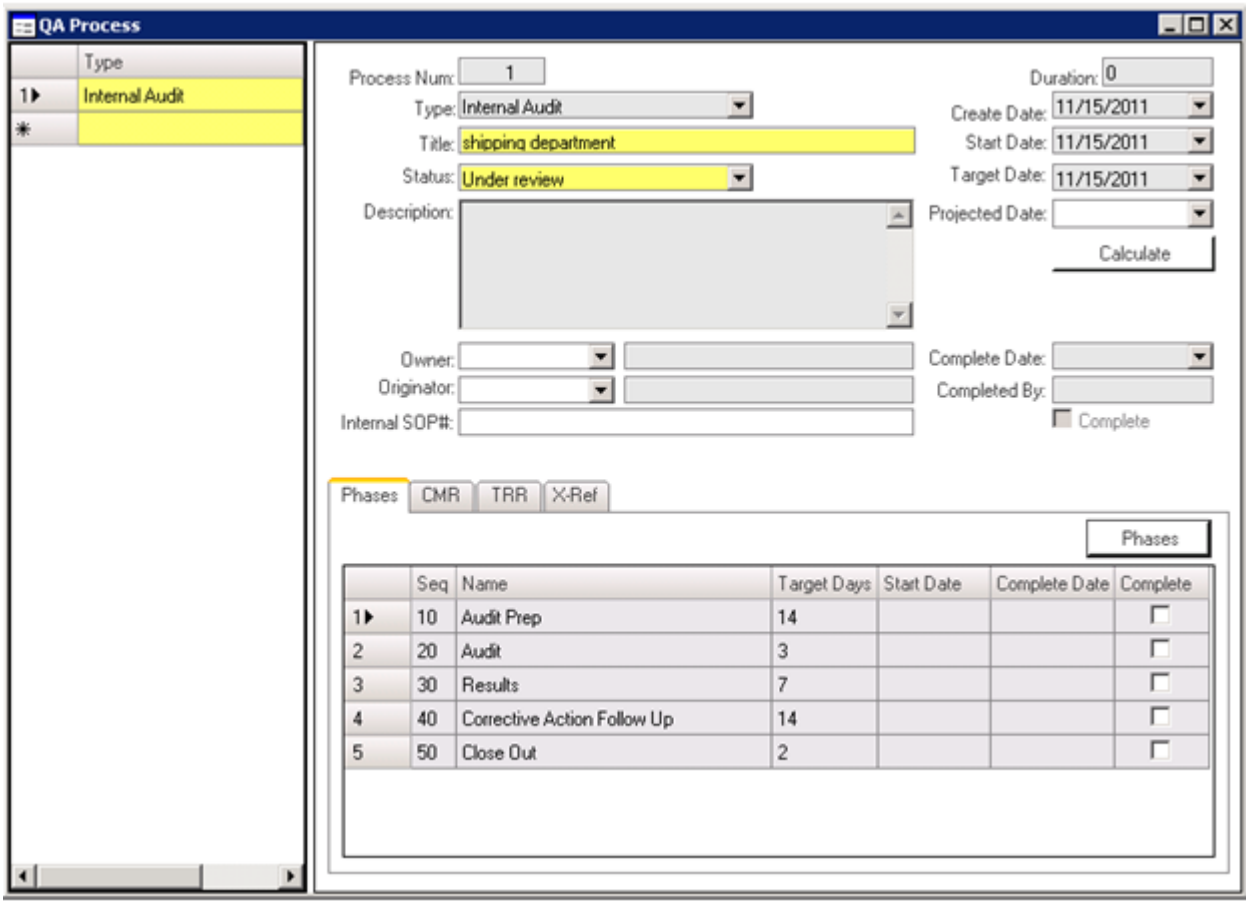
- Type: This is a drop down list where either Employee or Department can be selected. The selection will then activate either the employee or department selection fields.

- Employee Number: Will only be active if Employee is selected as the resource Type. Is a drop down list of all Employee numbers entered into SyteLine. When an employee number is selected, the name associated with the Employee number will display on the Name field.

- Department: Will only be active if Department is selected as the resource Type. Is a drop down list of all Departments entered into SyteLine. When a Department is selected, the department name is displayed on the Name field.

- Note: is a user defined field where any notes can be added concerning the QA Phase Activity Owner.

QA Process



DESCRIPTION: The QA Process is used to create and then track all activities associated with a specific process. The QA Process is based on an already created QA Process template. The form, once create, is used to track all activities and to cross-link to any associated SyteLine documents. The user will create a new record, and choose the Process Type from a dropdown list. Once the process flow is named and saved, it will generate an entire QA Process record set based upon the template chosen.

Field Descriptions:

- Process Num: A system generated number that is unique for every Process created.

- Type: This is a drop down list where the appropriate QA Process Template is selected. All Phases and Activities will be based off of the template selected.

- Title: The title of the specific process is entered.

- Status: Using the drop down list, the appropriate status is selected to designate the current status of the project. This can be changed/updated throughout the life of the specific process.

- Description: A read only field that will show the description that was entered with the QA Process Template selected (if one was entered otherwise blank).

- Owner: Information field – can use the drop down list to select a SyteLine user number and the name will also display.

- Originator: Informational field – can use the drop down list to select a SyteLine user number and the name will also display

- Internal SOP#: Information field – can enter a specific document or procedure name/number for informational purposes for those who will be working on the process

- Duration: A system generated field that shows the number of calendar days from the initial create date to the current date.

- Create Date: A system generated field that shows the date that the process was first created.

- Target Date: A system generated field that is the start date plus the total duration in calendar days for all QA Phases for the process type.

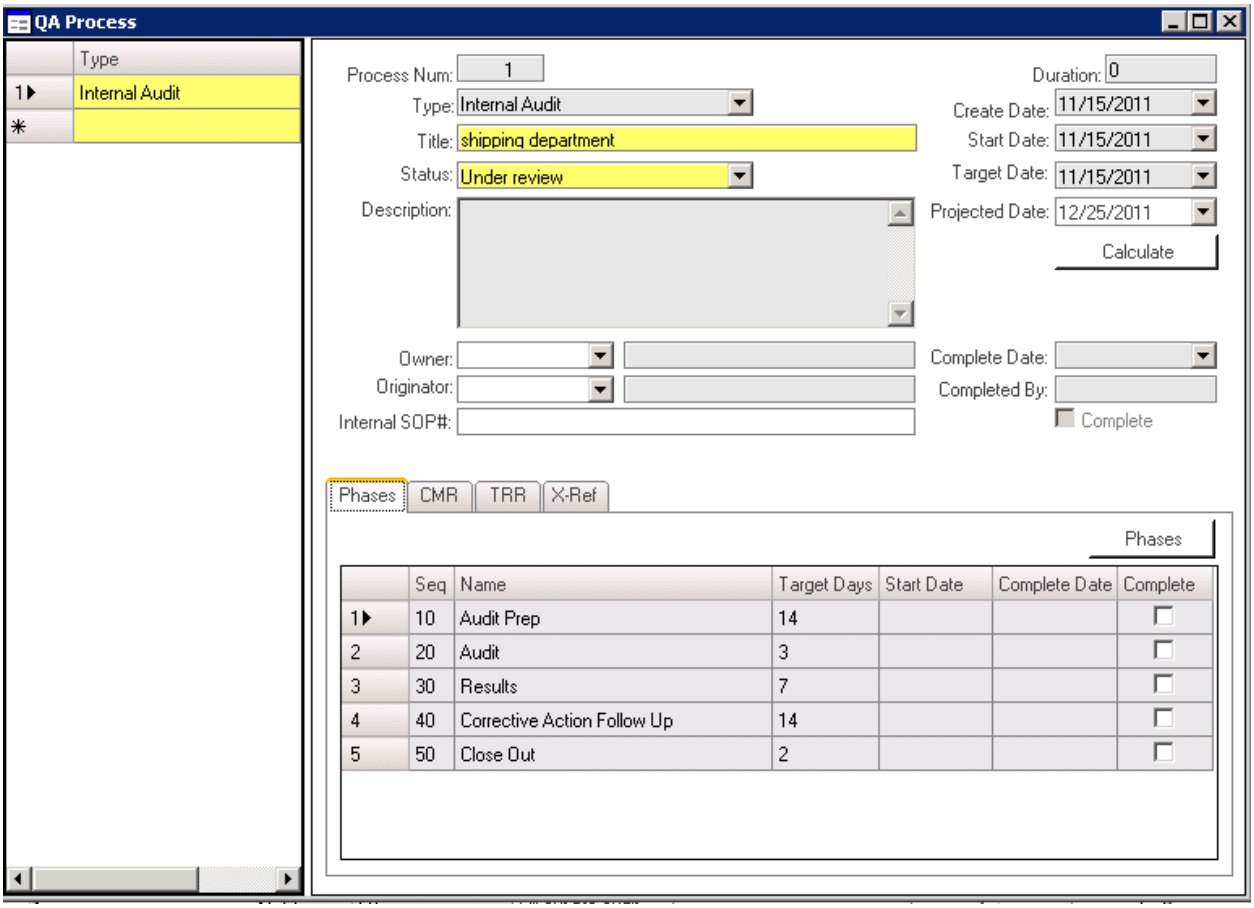
- Projected date/ Calculate button: When the Calculate button is selected, the system will update the Projected Date. The projected date is the total of all durations for all non-completed phases added to the current date. This can be updated as desired by reselecting the Calculate button.

- Complete Date: When clicking the Complete checkbox, the Complete Date defaults to the current date. A QA Process can only be marked as complete when all associated phases are marked as complete.

- Completed By: When clicking the Complete checkbox, the Completed By field populates with the user initials of the logged in user. A QA Process can only be marked as complete when all associated phases are marked as complete.

- Complete Check box: is selected when all activities and all phases of a process have been completed. It automatically populates the Complete Date and Complete By fields.

Phases Tab:

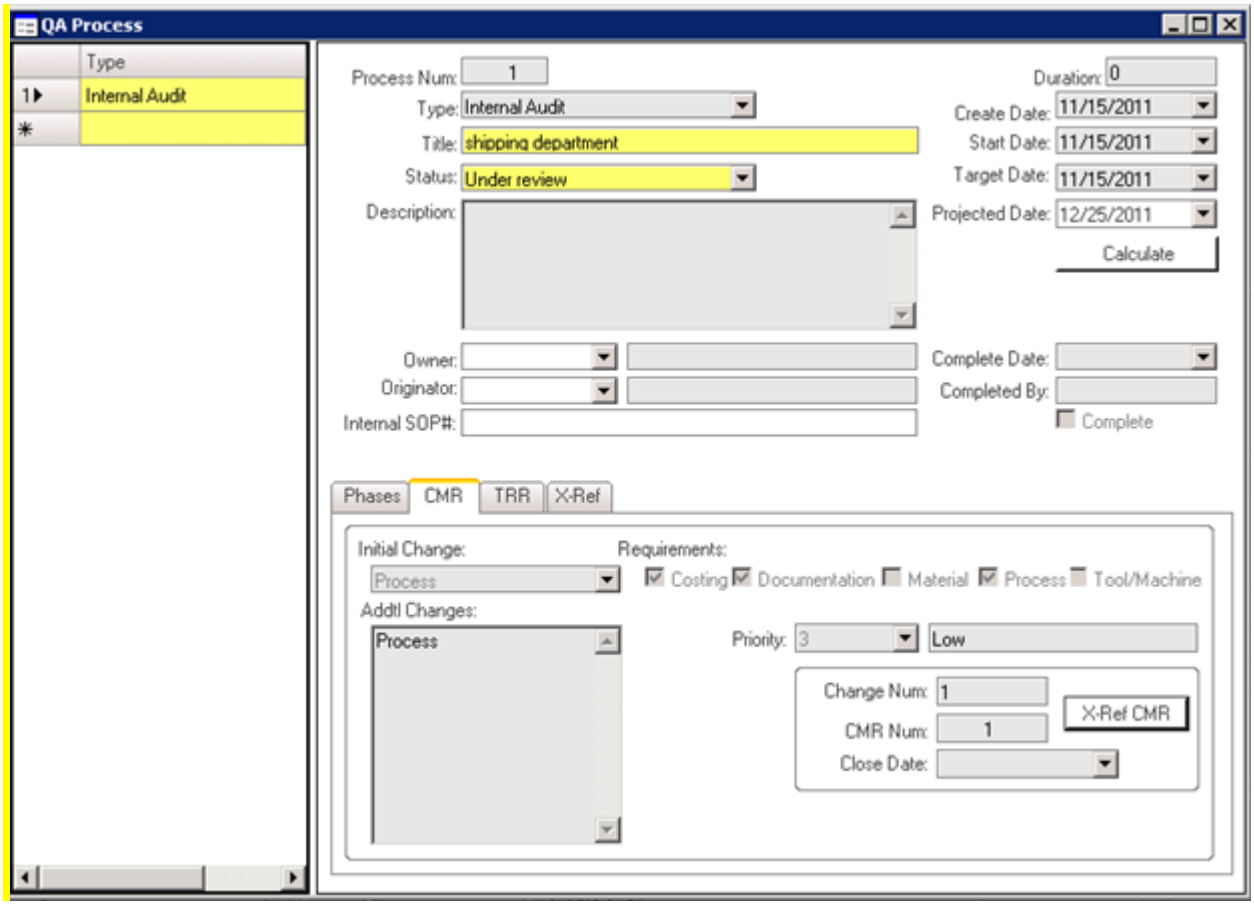


This tab shows the status of all phases associated with the project as designated in the specific project template. All data shown in the sub-grid is read only.

- Seq: System assigned sequence number for the phase
- Name: Name of the specific phase
- Target Days: Duration in calendar days as entered in the process template
- Start Date: date that was entered for the specific phase
- Complete Date: date that the phase was marked as complete
- Complete: Box is checked when the Phase has been completed.

- Phases: This button is selected to open the QA Phases (Linked) form.

CRM Tab:



This tab provides the ability to create a Change Request and convert to a CMR from within the QA Process form.

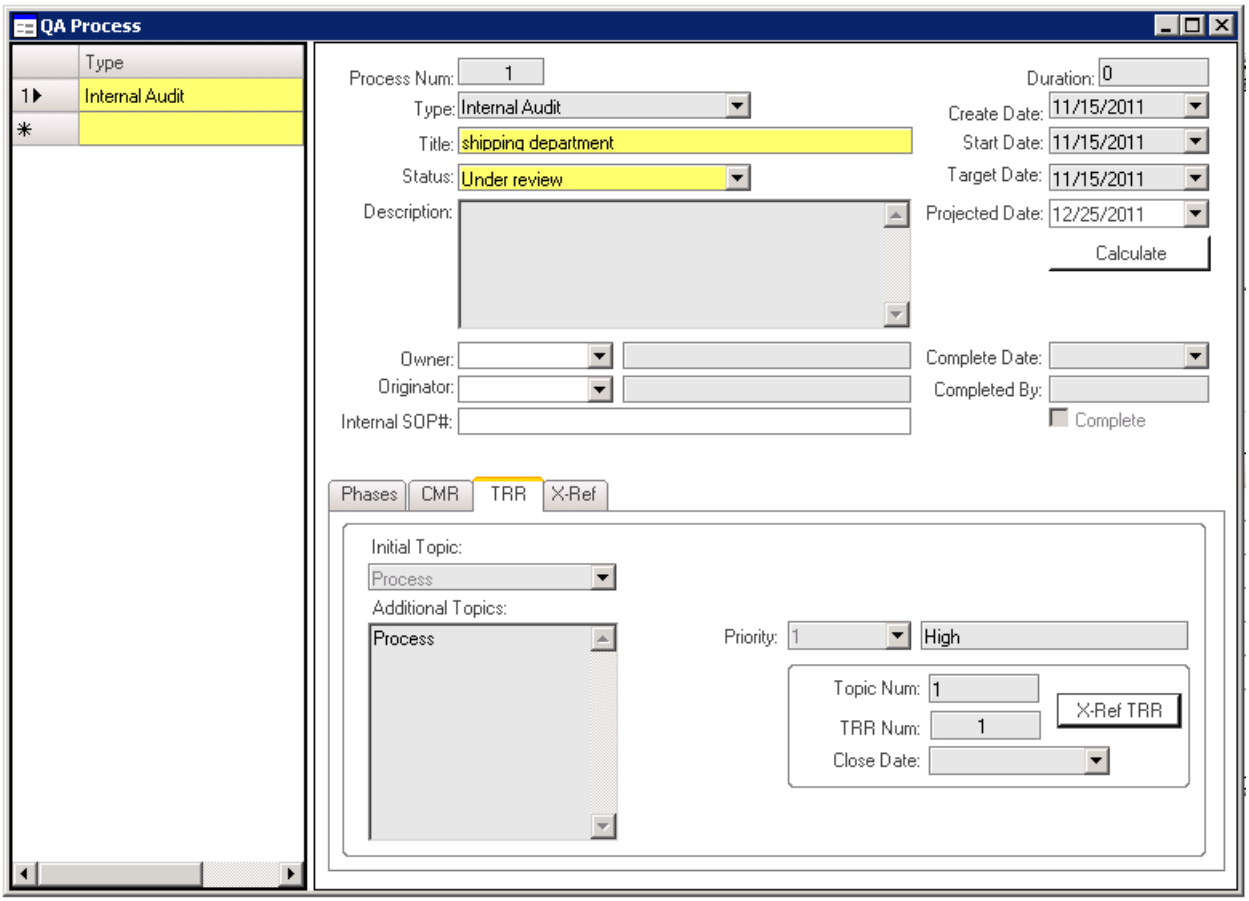
- Initial Change: Use the drop down selection to designation the initial change type.

  Note: when creating a Change request from inside QA Process rather than from the Create Change request form you cannot select additional changes.

- Requirements: read only check boxes show areas that require review as set up in QC Change Types form.

- Priority: Drop down list selection of change priority.
- X-Ref CMR Button: If this button is selected the change request information is converted to a CMR and the relevant CMR information is displayed.
    - Change Num: The system assigned change request number
    - CMR Num: The system assigned CMR number
    - Close Date: Will display the date that the CMR is closed.
- Note that after the CMR has been created clicking the X-Ref CMR button will open the CMR form.

TRR Tab:



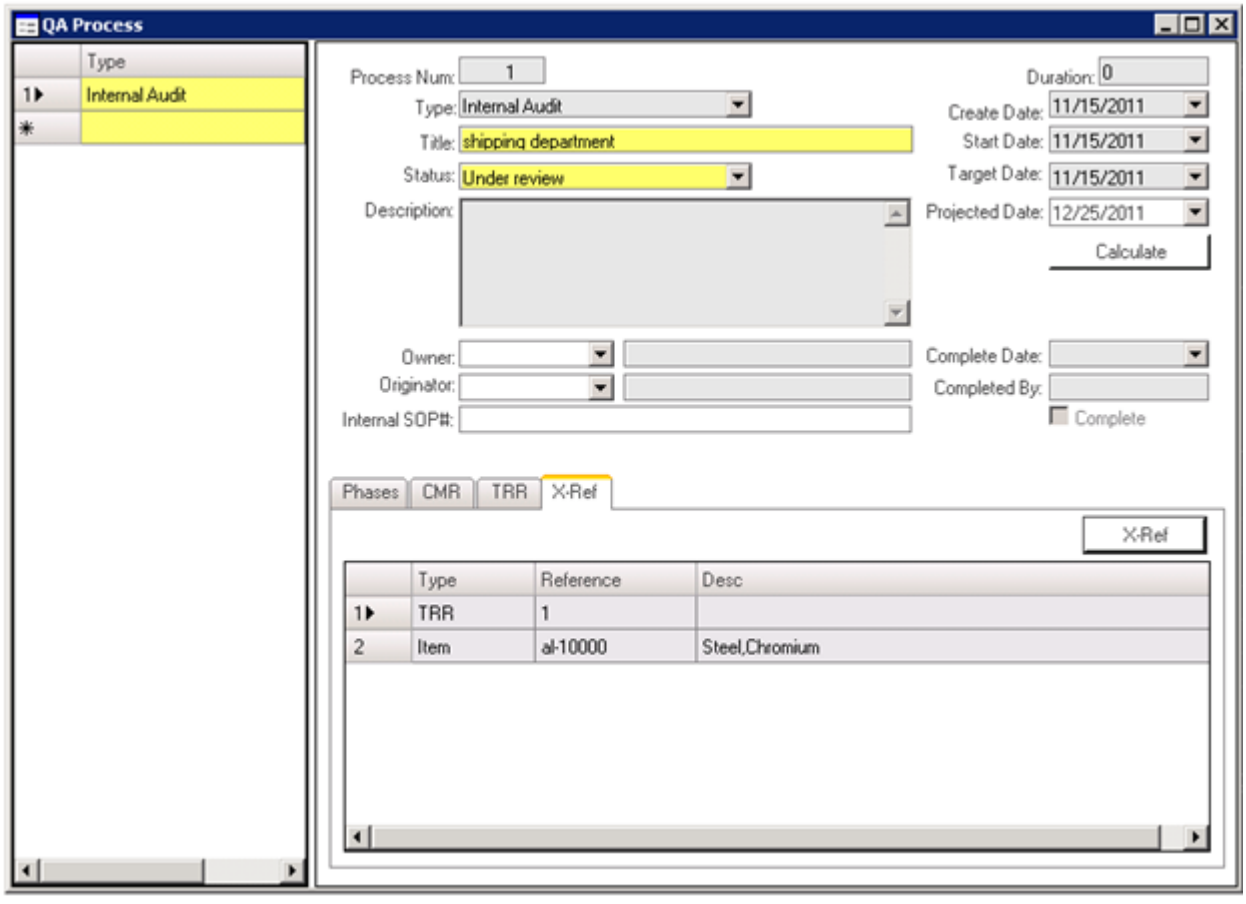
This tab provides the ability to create a Topic Request and convert to a TRR from within the QA Process form.

- Initial Change: Use the drop down selection to designation the initial Topice type.

Note: when creating a Topic request from inside QA Process rather than from the Create Topic form you cannot select additional changes.

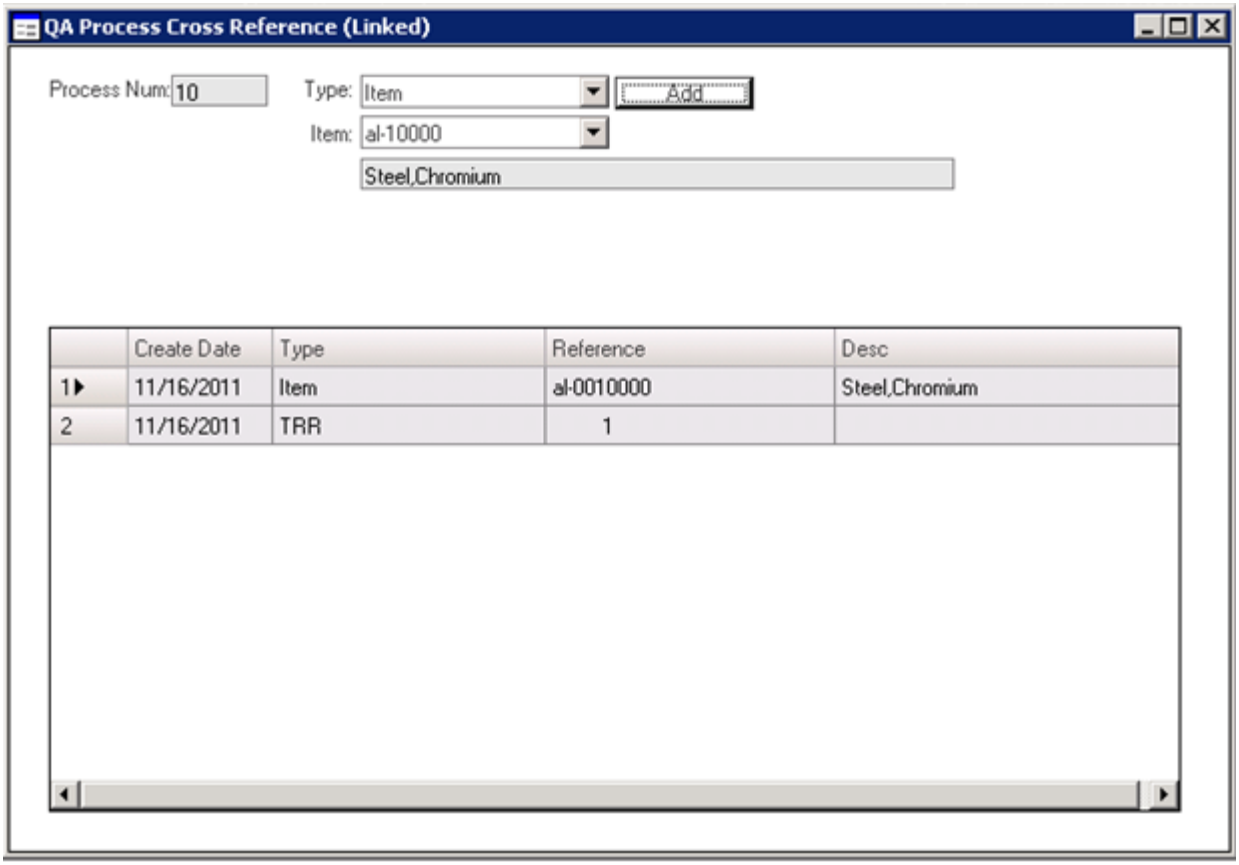
- Priority: Drop down list selection of change priority.
- X-Ref TRR Button: If this button is selected, the Topic information is converted to a TRR, and the relevant TRR information is displayed.
    - Topic Num: The system assigned Topic request number
    - TRR Num: The system assigned TRR number
    - Close Date: Will display the date that the TRR is closed.
- Note that after the TRR has been created clicking the X-Ref TRR button will open the TRR form.

X-Ref Tab:



This tab provides the ability to create a sub grid that displays all types of SyteLine records that are cross linked to the Process.

- XRef: When this button is pressed it opens the QA Process Cross Reference (Linked) form. This form is used to create the cross reference.

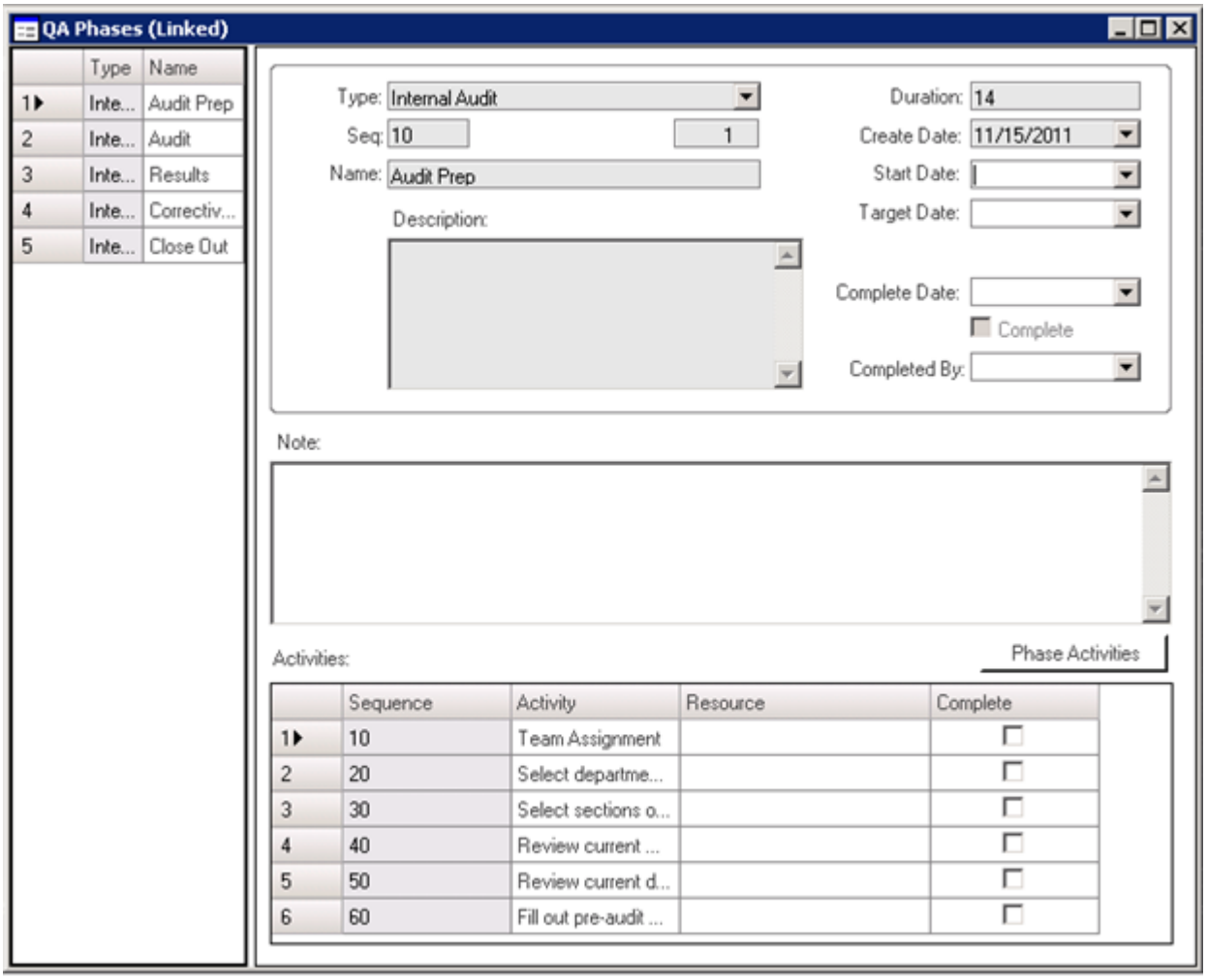


This form is used to create the cross reference. All information that is cross referenced through this form is displayed as read only on the QA Process X-Ref tab sub-grid.

- Type: A drop down list that contains the item types that can be cross referenced. After a type is selected, the add button is selected.

- Field below type: Once the Type is selected, this field is named with the type that was selected and becomes a drop down of all record numbers for that type that are currently in SyteLine. The desired record is selected and the form is saved. The cross reference will then display in the sub-grid.

QA Phases



DESCRIPTION: The QA Phases is used to track all activities associated with a specific process. There are multiple entries for each phase in a specific process. The phases and associated activities are derived from the Process template.

Field Descriptions:

Type: Read only – Displays the Process template Type

Seq: Read only – displays the Phase designator

Name: Read only – displays the specific process name

Description: Read only - Displays any Description that is associated with the process type.

Duration: Read only – Displays the days entered for the phase in the process template.

Create Date: Read only – displays the date the specific process was created

Start Date: can select the actual start date for the specific phase

Target Date: can select the specific target date for the specific phase

Complete date: Will auto fill when the Complete box is checked. Will populate with the current date

Complete: Is checked when the phase is complete. NOTE: all associated activities for a phase as well as all predecessor phases must be complete prior to this being selectable.

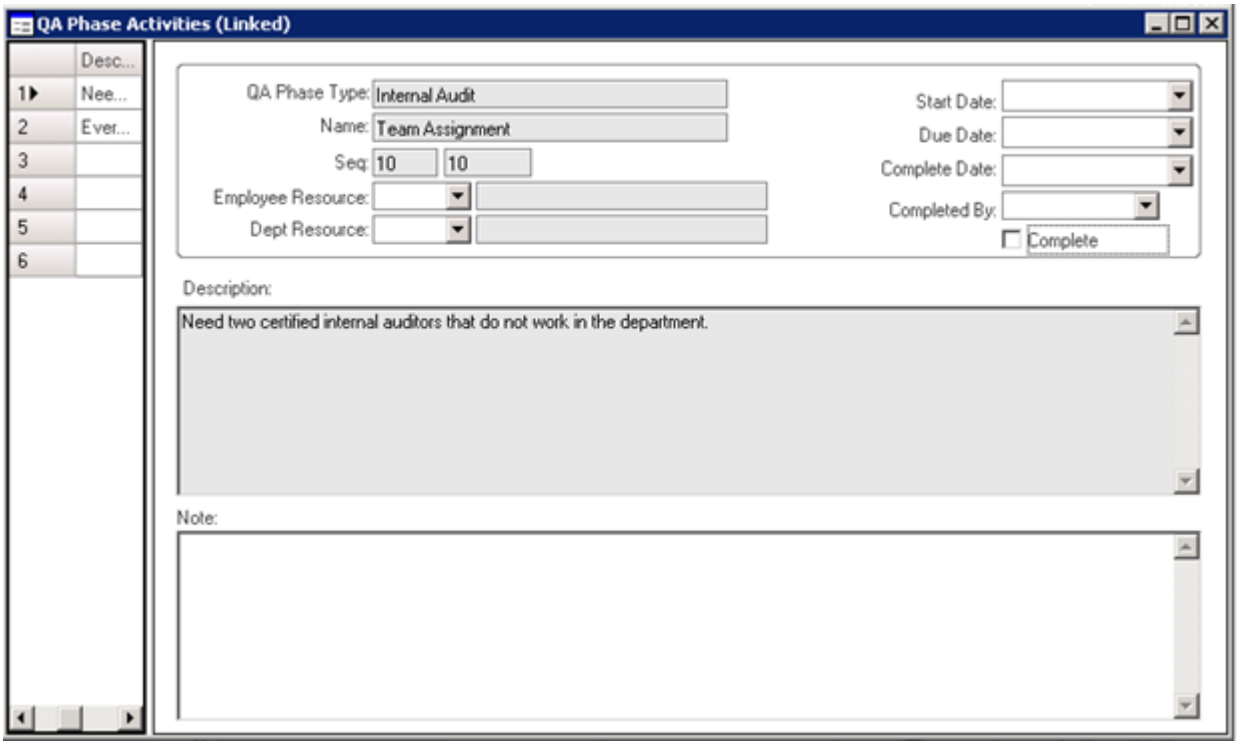
Completed By: Will auto fill when the Complete box is checked. Will populate with the logged in user initials.

Note: User defined field to enter any notes

Phase Activities button: Is selected to open the QA Phase Activities (linked) form.

Sub grid: displays in a read only format all information for activities that are associated with the specific phase.

QA Phase Activities



DESCRIPTION: The QA Phase Activities is used to track all activities associated with a specific process phase. There are multiple entries for each activity associated with a specific phase in a specific process. The activities are derived from the Process template.

Field Descriptions:

QA Phase Type: Read only – Displays the Process template Type

Seq: Read only – displays the Process and the Phase designator

Name: Read only – displays the specific activity name

Employee Resource: Displays the employee resource if one was entered in the Process template creation.

Dept Resource: Displays the department resource if one was entered in the Process template creation.

Start Date: can select the actual start date for the specific activity

Due Date: can select the specific target date for the specific activity

Complete date: Will auto fill when the Complete box is checked. Will populate with the current date

Complete: Is checked when the activity is complete. NOTE: Can complete activities in any order.

Completed By: Will auto fill when the Complete box is checked. Will populate with the logged in user initials

Description: read only display of the activity description if one was entered during Process template creation.

Note: User defined field to enter any notes

QCS Enterprise Sample Topics, Changes & Processes

Sample Topics

Topics	Examples	Additional topics
Accident investigation	employee slips in walkway. Topic to document investigation and actions to prevent further slips.	maintenance, safety
Audit finding	Internal ISO audit finds a nonconformance with training records not up to date per Quality Manual. Per ISO need to document non-conformance,	documentation, training
Documentation	Current SOP for how to package product does not show the current correct SKU's for packaging cartons. Need to make sure SOP is reviewed and	training, process
Improvement Opportunity	Employee believes moving staging cart to left will eliminate extra travel and reaching. Need to document investigation and possible changes	process, training, safety
Machine	hourly employee observes a machine working without guard in place. Machine is supposed to not start if guard is not in place. Need to	maintenance, safety , training
maintenance	oil is found under machine . Need to investigate source and clean up. May need to check other machines.	maintenance, safety
Process	the current tooling change over process uses pliers instead of socket wrench resulting in slow change overs. Kaizan event team members recommend	improvement opportunity, process, training
Safety	employee observed operating grinder without grinder guard in place. Document corrections may need additional signage or changes to machine.	training, process, possible machine(to install kill switch)
Training	Employee observed not using alignment tool for tapping holes. Result is inefficient operation since employee takes so long to prevent scrap.	process, training, documentation
NOTE: many topics can fall under multiple categories. The design is to make it very simple and quick to record any topic by using the 'first thing that comes to mind' approach. The additional topics field can then be used to list all pertinent topics. this makes it simple to report on ALL		

Sample Changes

Changes	**Examples**
Documentation	see # 3 above. TRR review may result in the need to change SOW and make sure training is done
Machine	See # 5 above - TRR review could decide that installation of a kill switch/light curtain on machine is required the CMR would be used to ensure it was installed and follow up training was completed
Material	Proposed change from plywood to OSB for building cabinet. Want to make sure all costs, documents are properly updated
Process	See # 7 above - Would require a change to the process (which would include documentation)
Specification	New equipment requires a tighter specification on a machine cut out from supplier. Part number will Not change however need to update QC tests as well as related documents.
Variance (waver)	Received a shipment of parts that had a stack up tolerance issue. Was tested and would work but quality system requires that the use of this lot be documented under a waver. NOTE: would reference this waver as a note in the Supplier MRR disposition

NOTE: Change management is used to make sure that all required aspects of a change have been reviewed. It prevents changes from becoming 'lost' and provides documentation on how/what/when changes were made for compliance with audits/quality systems

Sample Processes

NOTE: The number next to Phase is the duration in days.

Internal Audit:

Phase	***activity***
Audit prep	*14*
	team assignment
	Select department to audit
	Select sections of Quality Policy to audit
	review current Quality Policy sections
	review current documentation
	fill out pre-audit assessment
Audit	*3*
	tour department/area
	review documentation
	interview employees
Results	*7*
	Create and submit formal audit report
	Create Topics for findings needing action
	create CRM for topics needing change
Corrective Action Follow up	*14*
	confirm efficacy of corrections
	close out TRRs and CMRs
Close Out	*2*
	Confirm all activities closed
	schedule next audit for department

New Product Introduction:

Phase	***activity***
Research	*21*
	Evaluate concept against strategy
	define market position
	assess competition
	market analysis
	sales potential calculation
	Analysis of technical feasibility
	Project definition
	Develop project plan and budget
	Research approval
Prototype	*84*
	Identify key customers
	develop marketing plan
	Determine product ROI
	breadboard design
	risk assessment (start FMEA)
	Identify critical parts
	develop initial product specification
	Manufacturing risk assessment
	preliminary manufacturing plan
	Preliminary BOM
	First estimate product cost
	Update Project plan
	Purchase Beta build parts
	Prototype approval
Beta build	*56*

	Finalize product data sheets
	update sales forecast and ROI
	Identify first client targets
	train sales force
	Develop manufacturing SOPs
	train Manufacturing personnel
	build/test Beta units
	Finalize manufacturing plan
	Update FMEA
	validate assembly and test fixtures
	assess manufacturing capacity
	Update BOM
	Begin formal product revision control
	Update Project Plan
	Purchase Pilot build parts
	Determine single source components
	conduct product service assessment
	develop service and repair documentation
	Beta Approval
Pilot	*21*
	Book pre-production sales
	Validate final product specification
	support manufacturing build
	Build Pilot units
	Update BOM with pilot actuals
	validate all costs
	define production preventative maintenance plan
	Update project plan
	Purchase parts to forecast (to volume)
	finalize vendor contracts
	set PPV goals
	Pilot Approval
Commercialize	*21*
	Final review of sales literature
	Final review of sales forecast
	final review of marketing plan
	Build to sales forecast
	Purchase to forecast
	review of project plan
	Project close out

Capital Request:

Phase	***activity***
Business Case	*14*
	rough ROI
	develop RFQ
	send out minimum of 3 RFQ
Analysis	*30*
	review of returned RFQ
	Vendor follow up
	Selection of Vendors
	Calculation of additional costs
	Development of implementation plan
Formal submittal	*7*
	Capital Request form filled out and submitted with final ROI
	Form approved for submittal
	Capital Expense - review meeting
Approval	*14*
	ordering of capital
	installation
	final report on costs and variances

Variance:

Phase	***activity***
Research	*21*
	Evaluate concept against corporate strategy
	Define positioning
	Assess competition and price target
	Market analysis
	Production Definition
	Sales potential
	Preliminary analysis of technical difficulty and feasibility
	Project scope
	Define IP position
Prototype	*56*
	Project plan and budget
	Re-evaluate product definition
	Identify key customers
	Update sales forecast
	Marketing plan
	Determine ROI
	Breadboard design and test
	Risk assessment
	Identify critical parts
	Product spec
	Finalize IP position
	Manufacturing risk assessment
	Preliminary manufacturing plan
	Update project plan and budget

	Preliminary BOM
	Estimate product cost
	Purchase engineering parts
Alpha	*56*
	Update sales forecast and ROI
	Update marketing plan
	Product data sheet
	Build and test Alpha units
	Latitude testing
	Finalize product spec and requirements
	Finalize design
	Update manufacturing risk assessment
	Product cost estimate
	Update manufacturing plan
	Prototype assembly and test fictures
	Order manufacturing capital equipment
	Assess capacity
	Update project plan and budget
	Update BOM, SyteLine, and vault
	Release numeric rev
	NRE customer support
	Purchase parts for Alpha units
	Procurement plan for volume purchasing
Beta	*56*
	Finalize product data sheet and manuals
	Update sales forecast and ROI
	Identify lead users and deliver Beta units
	Train sales force
	Press release
	Train manufacturing personnel
	Test Beta units
	Identify CPs
	Execute on QTP
	Finalize mfg plan
	Address mfg risks
	Refine cost data
	Validate assembly and test fixtures
	Assembly and test fixture instructions
	Install/validate capital equipment
	Assess mfg capacity
	Update project plan and budget
	Update BOM as needed

	Initiate Release ECO, Approval 1
	Update numerical rev as needed
	Purchase parts for Beta units
	Exercise second source
	Facilities and work force assessment
	Evaluate product serviceability
Pilot	*42*
	Book pre-production sales, delivery after release
	Validate product spec
	Support mfg build
	Run several production builds
	Address all mfg issues
	Validate cost data
	Validate assembly and test instructions
	Define maintenance plan
	Update project plan and budget
	Update BOM as needed
	Finalize Release ECO, Approval 2
	Update numerica rev as needed
	Purchase parts for annual volume
	Finalize vendor contracts
	Continue second source
	Build production units
	Define service plan
	Diagnostic flow charts
Release	*21*
	Marketing launch
	Book sales
	Build to sales forecast
	Finalize Release ECO
	Post-Mortem
	Build production units

Product Change:

Phase	***activity***
identify change	*7*
	fill out change request form
	identify change
	designate change type
	identify reason for change
	Create CMR
research	*21*
	if part where used
	Determine of PPAP needed
	Materials review
	Cost review
	Process review
	Documentation review
	Tool/Machine review
	Impact analysis
review and approval	*21*
	Customer approval if required
	Sales approval
	Manufacturing approval
	quality approval
	accounting approval

	Engineering approval
initiate	*21*
	training processes updated
	training completed
	BOM updated
	Part Submissions Warrant if required
	cut in date established
	final approval for change
cut in	*7*
	approval put in place
	CMR closed

PPAP

Phase	***activity***
Company initiated change to part	***7***
	determination of correction to previous submittal
	determination of modification to part or records or specifications
	determination of new part
Customer Notification	*7*
	Customer Purchase Order
	Customer Part Design requirements
	Customer Process Design requirements
	Customer Specifications
	Customer Logistics requirements
	Customer Waives PPAP requirements
Gather Information	*21*
	Assign Project Owner
	Assign project team
	Determine submission level
Completion of Required Items	*42*
	Design record
	Engineering Change Documents

	Customer Engineering Approval
	Design FMEA
	Process Flow Diagrams
	Process FMEA
	Control Plan
	Measurement System Analysis Studies
	Dimensional results
	Material, Perfomrance Test Resutls
	Initial Process Studies
	Qualified Laboratory Documentation
	Appearance Approval Report (AAR)
	Sample Product
	Master Sample
	Checking Aids
	Record of Compliance
Completion of Part Submission Warrant	*21*
	Part Information section
	Oganization Manufacturing Information
	Customer Submital Information
	Materials Reporting
	Reason for Submission
	Submission Level
	Declaration
Receipt of PPAP Status	*14*
	Approved
	Interim Approval
	Rejected

QCS Enterprise Reports

The QCS Enterprise module has a variety of reports.

- **QC Topic Tag**: Topic tags can be printed\reprinted from both the QC Topic Creation and QC Topic Management forms. It contains a summary of information about the Topic Receiver.

- **Change Tags**: Change tags can be printed\reprinted from both the QC Change Creation and QC Change Management forms. It contains a summary of information about the Change Receiver.

- **CMR Form report**: contains detailed information about CMRs. The user has the option to select CMR Num, Inspector, Create Date, and Close Date ranges, as well as the ability to print CMR and Change Receiver notes.

- **CMR Status report**: summary report for the CMR Form. The user has the same selection criteria as the QC CMR Form, and is used to view CMR information based on the status of the QC CMR.

- **TRR Form report**: contains detailed information about TRRs. The user has the option to select TRR Num, Inspector, Create Date, and Close Date ranges, as well as the ability to print TRR and Topic Receiver notes.

- **TRR Status report**: summary report for the TRR Form. The user has the same selection criteria as the QC TRR Form, and is used to view TRR information based on the status of the QC TRR.

QCS Frequently Asked Questions

- How do you add new vendor communication status codes?

  These codes are pre-set. A modification is required to add new codes to the current list.

- Why doesn't the Vendor/Cust # for an item populate the field from standard SyteLine? What is the purpose of this field?

  The Vendor Number on a QCS Item can be left blank for a type 'P'urchased item. This indicates that the information on the QCS Item record is for all vendors for this item (unless there is a specific entry for this item/specific vendor). Similarly, when setting up QCS Items for the Customer module, the customer number can be set (specific information for this item/customer), or left blank (default information for this item, if no specific customer information set up).

- Why doesn't the QCS module use the Type or Source from standard SyteLine?

  When setting up a new item, the Ref Type will default to 'P' (Purchased) if the SyteLine Item Source is Purchased, similarly the Ref Type defaults to 'J' (In Process) if the SyteLine Item Source is Manufactured. The Ref Type can then be changed by the user. Valid values are 'P' (Purchased/Supplier), 'J' (Job/In Process) and 'O' (Order/Customer).

- What indicates to the user that there are notes?

  Like all standard SyteLine notes, if notes exist for QCS data the notes button will change from white to yellow and lines will appear across the notes button.

- Can the equipment used for testing be stored and a pull-down menu be accessed to choose equipment from?

  There is an option (Check gage/equipment on tests) on the QC General Parameters form.

- Can QCS be set up to automatically reference AQL acceptance criteria?

  QCS stores test data based on the QC tests identified for the item. QCS does not currently reference AQL criteria.

- Can QCS store test procedures for an item?

  Yes, QCS has the ability to store a test plan and specific tests for a SyteLine item. There is also a utility that allows the user to 'copy' tests from one item to another.

- Can QCS feed QC info to a Purchase Order?

  Not currently.

- Can QCS feed QC info to a Purchase Order for return?

  On the VRMA Maintenance – Reference tab. When the Xref button is selected for a new PO, a Planned PO is created for the item/quantity on the VRMA.

- When using the 'Print Tag' option, can QCS print labels? Barcodes?

  QCS provides the basic information. Changes to labels can be reviewed per client.

- Can the MRR form be modified to meet our needs?

  The MRR number is linked to the Receiver number. The MRR form compiles all the related information regarding this receipt. A change in format will require a modification.

- Does the QCS module allow for a MRR "sign-off"?

  The current version of QCS does not include an electronic "sign off" feature.

- Can I send the MRR to a specific function for disposition?

  You can e-mail the reports to the appropriate individual(s) for MRR processing.

- Why would I be interested in QCS Enterprise?

  Enterprise is specifically designed to handle any quality system requirements that are not directly related to a specific item and the testing/acceptance of that item.

- I have a problem with QCS and can't figure it out.

  Contact INFOR at: www.infor365.com.

  They offer standard support for the QCS modules.

Glossary

Alerts: Messages that display during QC and standard SyteLine functions based on criteria set up for QCS Items, Vendors and Parameters

Browser: A listing or display of available entities to view. (for example, in QC Items, you can see a list of all the tests set up for that item in a browser on the 'Tests' tab)

C_p: Process Capability. An indicator of process capability. The formula is: (USL - LSL)/6*Std.Dev

C_{pk}: Process Capability Index. This is an adjustment of Cp for the effect of a non-centered distribution. Generally you should have a C_{pk} of 1.33 [4 sigma]to call a process under control. The formulas are:

Cpl = (Mean - LSL)/3*Std.dev
Cpu = (USL-Mean)/3*Std.dev
Cpk = Min(Cpl,Cpu)

CAR: Corrective Action Request. A CAR is a formal document used for tracking responsibilities, actions to be taken to remedy a problem, and timeframes in which actions will be taken.

Cause Code: Provides a concise description of the 'root cause' of a set of rejected material. Examples: Equipment out of calibration, Wrong drawing used, Inadequate operator training

CCR: Customer Complaint Report

Checkpoint: An inspection or test step

CMR: Change Management Report

Communication Status: An indication of the current state of QC documentation available for a vendor as the vendor goes through the approval process. Valid entries include: Approval Sent, Survey Received, Survey Sent, Need Survey, Open, Need Approval. (see QC Vendors at *page 88*)

Disposition Code: A code used that describes what action will occur for a set of Accepted or Rejected material. Examples: Return to vendor, Move to stock, Sort, Scrap, Rework

Entity: An Operation, Vendor, or Customer

Failure Code: A user defined code that describes a failure or the cause of a failure while reporting test results.

Inspection Frequency ID: For QC Supplier Items, determines when the system will auto-create QCS Receivers based on a Purchased Order Receipt for that item/vendor

LSL: Lower Specification Limit –The lowest value for a measurement that is still within specification

Mean: The average value calculated by summing all of the values and then dividing by the number of values.

MRB: Material Review Board. Typically a group of individuals from cross-functional areas designated to review and make disposition decisions on On-Hold/Rejected material.

MRR: Material Review Request. A request documenting the disposition of items that did not get processed through QCS within expected quality standards.

MSDS: Material Safety Data Sheet. A standard document which addresses various safety and health issues for an item; typically associated with chemicals. Examples of information included: method for disposal, recommended handling procedures, protective clothing/eyewear recommendations, hazardous components, etc

PPM: Parts Per Million

QC Status: Status of a QC receiver. Valid codes are: Accepted, Rejected, QCHold, Received

Reason Code: Provides detail about why the disposition for a batch of material occurred.

Receiver (Number): Each transaction that brings an item into the QC system is called a Receiver. Each Receiver has a unique identifier.

Ref Type: QCS functional areas: P(urchase)/ Supplier, J(ob)/ In Process, O(rder)/Customer R(MA)/Customer

Standard Deviation: A calculation that indicates the extent of deviation for a group as a whole, the dispersion of a set of data.

Topic: Any non-material quality issue, function and/or activity

TRR: Topic Review Report

USL: Upper Specification Limit –The highest value for a measurement that is still within specification.

Vendor Status: Defines the level of acceptance of a supplier (see QC Vendors at *page 88*)

Vendor Rating: Criteria used for vendor performance reporting. Looks at two areas: Material Quality points (based on the Disposition Code for that batch), and Delivery vs. Due Date (based on the PO Receipt date and the Vendor Rating Parameters).

VRMA: Vendor Return Material Authorization