Infor SyteLine QCS User Guide

Release 9.01.x

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The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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QCS Overview

The Quality Control Solution (QCS) module allows you to track Quality information for parts in the Item Master file. QCS allows you to comply with sections of the ISO 9001 Quality Systems Model.

QCS tracks items, vendors, jobs, and customers that are entered in the system.

Use these forms to set QCS parameters:

- General Parameters
- IP Parameters
- Customer Parameters
- Enterprise Parameters

About Cost Types

Cost types are used when you record the cost of quality (non-conformance) with both MRRs and CARs.

Commonly there are only a few costs types which are a broad, general classification of the costs. By contrast, QC cost activities are more specific.

These are examples of cost types:

- Prevention: 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: 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.
- Internal Failure (Prior to delivery to customer): 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.
- External Failure (After delivery to customer): Any costs incurred to correct a nonconformance after the product has been deliver ed to a customer. This may include Warranty charges, complaint adjustment, cost of return, allowances, penalties, and rework.

About Disposition Codes

Use the **Disposition Codes** form to define codes that are used for disposition.

For the QCS Supplier module only, performance points for item quality are based on the quantity and the points from the disposition code. For example, 75 points might be assigned for this:

- Status = ACCEPTED
- Ref Type = P
- Disposition = MTS (for Move to Stock)

50 points might be assigned for:

- Status = REJECTED
- Ref Type = P
- Disposition = SORT (for Sort)

We recommend that you set up a disposition code at full points for situations where the parts cannot be used, but it was not the vendor's fault. For example, 75 points might be assigned for this:

- Status = ACCEPTED
- Ref Type = P
- Disposition = DIT (Destroyed in Testing but the parts passed the test)

75 points might be assigned for this:

- Status = ACCEPTED
- Ref Type = PDisposition = DAM (Parts damaged during shipping, not the vendor's fault)

These codes indicate the relative importance of a product characteristic to meeting product requirements. In QCS, severity levels are informational only, and do not impact an item's disposition.

This table shows some common entries:

Status	Ref Type	Disposition	Action	Description
Accepted	P	MTS	Move	Move to Stock
Accepted	P	DIT	Issue	Destroyed in Test
Rejected	P	REWORK		Rework
Rejected	P	UAI	Move	Use as is
Accepted	J	MTO		Move to next operation
Rejected	J	REWORK		Rework

About Failure Codes

Failure codes are used on the QC **Test Results Entry** form and describe different types of information.

Failure codes can be used to describe these types of information:

- Failure of a part/product. Examples: Missing parts, scratched, poor fit
- Failure of the process. Examples: Machine Error, Process Error, Missing documentation.

The use of failure codes is determined by the QC **General Parameters** settings. If the failure codes are not checked, you can enter any value for a failure code; there is no checking for consistency in spelling, coding, and so on. Because there is no description for a failure code added on the fly, any reports or forms showing those entries show only the code. If the failure codes are checked, the value must be in the failure codes form before a code is used, and forms and reports display the code and its description.

More than one failure code can be assigned to an inspection. For example, a unit can be SCRATCHED and MISSING PARTS and MISSING DOCUMENTATION.

These are the Ref Types to use with failure codes:

- P: QC supplier for purchased/inventory items
- J: QC In process for manufactured items
- O: QC customer for customer order items
- R: QC customer for customer RMA items
- E: QC Enterprise

About Regulations

Use the **Regulations** form to add, change or delete regulations that might impact the handling of an item. You can then optionally specify one of these regulations for an item in the QC **Items** form.

Regulations can be either internal or external to the company. Multiple regulations can be referenced in a single entry on this form.

This table shows some examples:

Regulation	Description
HAZMAT	Hazardous Material
PPE	Personal Protective Equipment Required (internal)
RCRA	Resource Conservation and Recovery Act
RoHS	Restriction of Hazardous Substances (EU)
RoHS + HAZMAT	Restriction of Hazardous Substances and Hazardous Material

Allow Quick QCS

To create QC IP Receivers / MRRs on the **IP Parameters** form:

1. Open the **IP Parameters** form.
2. Select the **Allow Quick QCS** check box.
3. Specify desired information in the fields within the group box containing the Allow Quick QCS check box.
4. Save.

Calibrating a Gauge and Recording the Inspection Data

To record the detail inspection data when calibrating a gauge internally:

1. In the SyteLine **Items** form, add the gauge as an item with **Type** set to **`Other`**.
2. In the QC **Items** form, add the gauge as an item with **Ref Type**set to **`P`**.
3. Click **Test Maintenance**.
4. In the QC **Item Tests** form, add the gauge test plan for calibrations and tests.
5. On the **Supplier Receiver** form, create a supplier receiver for this gauge.
6. Create a test and record the test/inspection results.
7. Disposition the gauge receiver.

Cause Code Examples

You can set up cause codes on the **Cause Codes** form that are similar to the codes in the table.

Cause Code	Description
MANUAL	Manual or documentation
MAN	Operator
METHOD	Method or process error
MACHINE	Machine issues
MATERIAL	Poor material quality

More examples:

Cause Code	Description
ENG	Engineering
SHOP	Shop floor or production
PURC	Purchasing
VENDOR	Vendor error
TRAIN	Training

Closing a Change Request

To close a change request:

1. Open the **Change Request Management** form.
2. Specify the change number you want to close.
3. Select **Change Complete**.
4. Save.

Cost Activity Examples

This table shows examples of cost activities you can add on the **Cost Activities** form.

Cost Type	Cost Activity
INTERNAL FAILURE	Scrap - Internal
	Rework - Internal Analysis of problem
	Scrap - Supplier
	Rework - Supplier
	Redesign
	Re-inspection
	Retest
	Machine/Line Down
	Manufacturing Support
EXTERNAL FAILURE	Warranty Charge
	Adjustment
	Allowances
	Penalty
APPRAISAL	Incoming Inspection and test of suspect/non-conforming product
	In-process inspection and test of suspect/non-conforming product
	Final inspection and test of suspect/non-conforming product
	Document review
PREVENTION	Planning
	New product review
	Process control
	Audit
	Supplier Quality Evaluation
	Training

Creating a CAR Document

To create a CAR document:

1. Open the **Change Request Management** form.
2. Specify a change number that does not have an associated X-Ref CAR number.
3. Click **X-Ref CAR**.
4. Specify **Yes** or **No** when asked if you want to send an email.

Creating a Change Request

To create a change request:

1. Open the **Create Change Request** form.
2. Provide data to the required fields.
3. Specify this information:

   Priority
   This field defines the priority level as high, medium, or low.

   Initial Change
   This field allows you to specify the event or item that caused the initial change.

4. Click **Process**.

Creating a CMR Document

To create a CMR document:

1. Open the **Change Request Management** form.
2. Specify a change number that does not have an associated X-Ref CMR number.
3. Click **X-Ref CMR**.
4. Specify **Yes** or **No** when asked if you want to send an email.

Creating a Customer Complaint Record

To create a customer complaint record:

1. Open the **Customer Complaints** form.
2. Click the **New** button in the toolbar to create a new record.
3. Specify this information:

   Customer

   Product Line

   Reason Code

   Type

   Item
4. Save the record.

Creating a Customer Receiver

To create a customer receiver:

1 Open the **Create Customer Receiver** form.

2 Specify this information:

CO

(Line)

Quantity Received

From Location

From Lot

3 Click **Process**.

Creating an IP Receiver

To create an IP receiver:

1 Open the **Create IP Receiver** form.

2 Specify this information:

Job

First Article Receiver Only

3 Click **Process**.

Creating a Process Template

To create a Process Template:

1. Open the **QA Process Templates** form.
2. Specify the type.
3. Save the record.

   A template number is created by the system.

Creating a PS Receiver

To create a PS Receiver:

1. Open the **Create PS Receiver** form:
2. Specify the Schedule ID.
3. Click **Process**.

Creating an RMA Receiver

To create and RMA receiver:

1 Open the **Create RMA Receiver** form.

2 Specify this information:

RMA

(RMA Line)

Quantity Received

Location

3 Click **Process**.

Creating a Supplier Receiver

To create a supplier receiver:

1. Open the **Create Supplier Receiver** form.
2. Specify the type of receiver, either **Item**, **PO**, or **TO**.
3. Depending on the type of receiver you chose, different fields are then required. Provide information for the required fields.
4. Click **Process**.

Creating a Topic Receiver

To create a topic receiver:

1. Open the **Create Quality Control Topics** form.
2. Specify this information:
   Priority
   Initial Topic
3. Specify any other optional field information you want.
4. Click **Process**.

Maintaining Inspection Plans for Families of Related QCS Items

To maintain inspections plans for families of related QCS items:

1. Open the **Item Test Families** form.
2. Specify a test family.
3. Click **Test Family Maintenance**. The **Item Family Tests** form is displayed.
4. Specify a sequence number, a severity level, and a test method.
5. Provide any other desired information on the form.
6. Save.

Printing a Topic Tag

To print a topic tag:

1. Open the **Create Quality Control Topics** form.
2. Select the desired topic number.
3. Click **Print Topic Tag**.

Printing a Change Request Tag

To print a change request tag:

1. Open the **Change Request Management** form.
2. Specify the change number.
3. Click **Reprint Change Tag**.

QCS Supplier Inspection Frequency Type Logic

This topic describes the frequency types and provides some examples.

- CERT

  No inspection by the quality team is needed when the item is received. If the 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_Quantity*

  During purchase order receiving, items 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 you set up an item for a COUNT frequency type, the QCS **Item Inspection Break Qty** defaults to the value set for the selected **Inspection Frequency**.

  For example:

  Inspection Break Qty on QCS item = 100

  These PO receipts occurred: 01/06 qty 40; 01/13 qty 40; 01/20 qty 40; 01/27 qty 40.

  The receipt for 01/06 moves into QCS, because no previous receipts have been through QCS.

  The receipt for 01/13 is skipped because only 40 have been received since the last inspection.

  The receipt for 01/20 is skipped because only 80 have been received since last inspection.

  The receipt for 01/27 moves 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 moves to QCS. Inspection dates must be changed manually on QCS items. When you set 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 moves to QCS. The next inspection date is calculated based on the **Inspection Break Qty** for this QC item, and the QC item record is updated. When you set up an item for a DAYS frequency type, the QCS **Inspection Break Qty** defaults to the value set for the selected **Inspection Frequency**, and the QC **Item Next Inspect Date** is set to the current date, plus the number of days in the default quantity.

- FREQ *QCS_Item_Inspection_Break_Qty*

  Example: Inspection break quantity on QCS item, with PO receipts on 01/06; 01/13; 01/20; 01/27; 02/03; and 02/10. The receipt for 01/06 moves to QCS because no previous receipts were sent through QCS. The receipt for 01/13 is skipped because it is the first receipt since the last QC event.

The receipt for 01/20 is skipped because it is the second receipt since the last QC event. The receipt for 01/27 moves to QCS because it is the third receipt since the last QC event.

Using Points to Determine Supplier Vendor Performance

The **Supplier Vendor Performance Report** calculates and reports on the performance vendors in two key areas: product quality and on time delivery.

If **Show Detail** is cleared, the report prints one line per vendor, with average points. If it is selected, the report also prints a one-line summary of the points for each receiver.

Delivery points are based on purchase order due date vs QC date received. These days are scored against the delivery points as entered in the **Vendor Rating** form:

- **Points for On Time Delivery**: Specify the highest number of points to be awarded a vendor based on delivery.
- **Days Early (-) / Late (+)**: Specify the number of days early as a negative. Enter on time as 0. Specify the number of days late as positive. This information must be entered in order from maximum days early, to on-time, to maximum days late.
- **Points Deducted**: Specifythe number of points to be deducted from the Points for On Time Delivery.

Quality points are based on the quantity dispositioned and the points for the associated **Disposition Codes**.

Only vendors added to the QC **Vendors** form are reported.

The points reported are based on the values at the time the report is being run, not at the time the transaction is created.

This report is applicable for PO receipts only; it is not based on inventory or inventory usage.

Each receipt is weighted equally when the vendor average score is calculated, regardless of the quantity on the receiver.

Only receivers that are marked as complete are reported; open receivers are not included.

Delivery Points Example

Delivery points for On Time Delivery = 25

Days Early/Late	Points
-10	25
-03	20
-01	15

Days Early/Late	Points
-00	0
+01	10
+03	15
+07	20
+10	25

A PO receipt 5 days early receives a score of 25 - 20 = 5

A PO receipt 5 days late receives a score of 25 - 15 = 10