Infor LN Quality User Guide for Conformance Reporting

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About this document

This document describes the purpose, setup, and use of conformance reporting.

Objectives

The objectives of this book are to describe the purpose of conformance reporting, and to set up the required master data.

Intended Audience

This book is intended for those who want to learn how to use conformance reporting functionality, implement source inspection, and how to set up the required master data in the way that best serves their purposes. Both end users and users on administrator level will find the information they require.

Assumed Knowledge

Familiarity with the business processes involved in handling inspections in Quality and Warehousing, and general knowledge of the Infor LN functionality will help you understand this book. In addition, Quality training courses are available to give you a headstart.

Document summary

The first chapter, Introduction describes the purpose and the general characteristics of the Conformance Reporting Functionality.

The following chapters, describe the master data set-up required for implementing the conformance reporting and the source inspection process.

How to read this document

This document was assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

Please refer to the Table of Contents to locate the referred section.

Underlined terms indicate a link to a glossary definition. If you view this document online and you click on underlined text, you jump to the glossary definition at the end of this document. Non-underlined references do not represent a link to glossary definitions or other elements.

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Chapter 1
Introduction

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Conformance Reporting is strategic to Source Inspection in Quality. As a part of Source inspection, items require a conformance documentation check that must be performed before the items are shipped. Conformance documents can range from a simple label on a box confirming that source inspection has been performed through customer specific test reports to industry standard documentation such as First Article Inspection reports and certificates.

Chapter 2
Master Data set-up

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This chapter explains the master data set-up for conformance reporting.

Data set-up for Conformance Reporting

Conformance reporting for an item at the supplier premises is required:

- If an item's compliance to standards cannot be verified by the receiving business partner or if equipment, significant gauge, test equipment correlation problems exists.
- If the shipped items are assemblies comprising of component parts that cannot be verified except when unassembled.
- If outsourcing/Improved scheduling of parts can be realized.
- If source inspection is part of a supplier audit procedure (e.g. First Article Inspection)

Conformance reporting is applicable only for the order type purchase.

When a purchase order line is created and if the item requires a source inspection or a third party inspection for business reasons mentioned above, the same must be conveyed to the supplier.

Master data setup

To implement conformance reporting, the following data must be set up:

Step 1:

In the Implemented Software Components (tccom0500m000) session, check that the Quality Management checkbox is selected

Step 2:

In the Quality Management Parameters (qmptc0100m000) session, specify the default option set. Infor LN defaults this value in the Conformance Documents (qmptc0191m000) session.

Step 3:

In the Testing Combinations (qmptc0111m000) session, for an item or a quality group, select the conformance reporting check box. If this check box is selected, specifying the Standard test procedure is not mandatory. Inspection order is created only for conformance reporting.

If the standard test procedure is also specified, Infor LN creates separate inspection orders for conformance reporting and for the test procedures.

Step 4:

In the Conformance Document Types (qmptc0190m000) session, specify a conformance document type. The document type allows you to identify a conformance document.

Step 5:

In the Conformance Documents (qmptc0191m000) session, create a conformance document. The document code refers to the item characteristic defined in the Characteristics (qmptc0101m000) session.

Note In the Conformance Document Sets (qmptc0192m000) session, you can link multiple documents to a document set.

Step 6:

In the Conformance Reporting (qmptc0194m000) session, create a conformance reporting code. Infor LN refers to this code when the purchase order and the purchase contract are processed. You can link this code with the conformance document or a conformance document set.

If a third party business partner should certify the document, the BP must be specified in this session.

You can specify the conformance code in the Conformance reporting field in the First Article Inspection Rules (qmptc0116m100)/ Items - Purchase (tdipu0101m000)/ Items - Purchase Business Partner (tdipu0110m000)/ Items - Sales Business Partner (tdisa0510m000)/ Sales Order Lines (tdsls4101m000) sessions.

Specifying documents for a lot/serialized item

In the Conformance Documents (qmptc0191m000) session, you can specify if:

- Individual document for each lot or a serial of the receipt must be provided
- A single document for all the lots and serials in the receipt must be provided.

Step 1:

For a serialized item, select the **One Document Per Serial** check box for the supplier to provide one document for each serial of the item. Else, only one document for all the serials must be provided.

Step 2:

For a lot item, select the **One Document Per Lot** check box, for the supplier to provide one document for each lot item. Else, only one document for all the lots must be provided.

Step 3:

If the item is a serialized or a lot controlled, and these check boxes are selected, a test data line is created for each serial or lot in the Inspection Order (qmptc1100m100) session.

Note For an item that is both serialized and lot controlled, Infor LN first checks for the **One Document Per Serial**. If this check box is not selected, Infor LN checks wether the **One Document Per Lot** check box is selected.

In case, the conformance report comprises of a set of documents, you can specify if the document must be provided for each serial or lot. For an anonymous item also, only one test data line is created in the Inspection Order (qmptc1100m100) session.

Chapter 3
Source Inspection Process

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Implementing conformance reporting with no testing combination

For an item-business partner combination, you can implement conformance reporting even if a testing combination is not specified.

To Implement conformance reporting when a testing combination is not specified:

Step 1:

Specify the conformance code in the Conformance reporting field in the Items - Purchase (tdipu0101m000)/ Items - Purchase Business Partner (tdipu0110m000) or the Items - Sales Business Partner (tdisa0510m000)/ Item - Sales (tdisa0601m000) sessions.

Step 2:

Create a purchase order or a sales orders in the Purchase Order (tdpur4100m900) or the Sales Order (tdsls4100m900) session.

Step 3:

Select the inspection check box for the required order line in the Received tab of the Purchase Order Lines (tdpur4101m000) or the Sales Order Lines (tdsls4101m000) session. Infor LN populates conformance reporting code, based on the following search criteria:

- Conformance code specified in the FAI rules session if FAI is applicable for the item.
- Conformance code specified in the Item Business partner data session
- Conformance code specified in the Item purchase data session

Note To view or to inform the supplier about the conformance documents that are associated with a conformance report, click print and select the conformance reporting check box in the Appendices group box of the Print Purchase Orders (tdpur4401m000) or the Print Sales Order Acknowledgements/RMAs (tdsls4401m000) session.

Step 4:

Approve the purchase order and release the order to warehousing.

Step 5:

In the Warehouse Inspection (whinh3622m000) session:

- Review the conformance code in the conformance reporting field. Infor LN defaults this code after the approved purchase order is processed in Warehousing.
- Click details to verify the conformance documents linked to the code.
- Select the **Conformance Documentation Accepted** check box to accept the documents linked to each inspection line to process the Warehouse inspection Order. **Note** If conformance code is populated on the warehouse inspection, Approved quantity cannot be filled unless **Conformance Documentation Accepted** is checked.

Implementing Conformance Reporting with a testing combination

Implementing conformance reporting when a testing combination is specified:

If a testing combination is created for an item, the conformance document check is performed in Quality. Infor LN selects the document accepted check box in the Warehouse Inspection (whinh3622m000) session.

Step 1:

In the Testing Combinations (qmptc0111m000) session, create a testing combination for the specified item.

Step 2:

In the Purchase Order (tdpur4100m900) or the Sales Order (tdsls4100m900) session, create a purchase order for the specified combination and release the order to warehousing and confirm the order.

Step 3:

Form the Warehouse Receipt (whinh3512m000) session, access the Warehouse Inspection (whinh3622m000) session.

Step 4:

In the Warehouse Inspection (whinh3622m000) session:

- Review the conformance code in the conformance reporting field. Infor LN defaults this code after the approved purchase order is processed in Warehousing.
- Click details to verify the conformance documents linked to the code.

Note The document accepted check box in this session is disabled.

Step 5:

Infor LN creates an Inspection Order with **Test Type** set to **Conformance Reporting**.

Step 6:

In the Inspection Order (qmptc1100m100) session, specify the document number and the test data value.

Step 7:

View the Conformance Documentation Register (qmptc1650m000) session linked to the inspection order.

Step 8:

In the Conformance Documentation Register (qmptc1650m000) session, Infor LN sets the status of The Document Status field to Matched(Inspection), if a document number is added in to the test data line in the Inspection Order (qmptc1100m100) session.

Step 9:

In the Inspection order session, set the test data lines to complete. Complete and process the order inspection to which the inspection orders are linked.

Note In the Warehouse Inspection (whinh3622m000) session, review if the **Conformance Documentation Accepted** checkbox for each warehouse inspection line is set to checked. Infor LN checks for this conformance before the warehouse inspection order is processed in Warehousing.

Conformance Document Register

The conformance document register contains the conformance data linked to the source order.

Conformance Document Register also contains the details of the lot numbers or serial numbers linked to the Conformance reporting codes during the inspection process.

Infor LN creates a register along with the inspection order when the specified conformance document is not available in the Conformance Documentation Register (qmptc1150m000) session. (For more information, see implementing conformance registration when a testing combination is created)

The conformance document register can be created manually. You can create a conformance document if the conformance document details are received before the shipment is received.

Pre-dispatch registration

Manual creation of the conformance document register is used to implement pre-dispatch registration. In some cases, the customer requests for the conformance documents to be sent before the dispatch of the goods. The supplier verifies the documents and the details are updated in the conformance register.

Implementing Pre-dispatch registration

Step 1:

In the Testing Combinations (qmptc0111m000) session, create a testing combination for a specified item or quality group.

Step 2:

In the Purchase Order (tdpur4100m900) session or the Sales Order (tdsls4100m900), create a purchase order or a sales order for the specified combination.

Step 3:

Approve and release the purchase order to Warehousing.

Step 4:

In the Conformance Documentation Register (qmptc1650m000) session:

- Create a new register with the origin set to purchase and the order origin set to the purchase order/sales order. A pre-dispatch register for a purchase order can be created only if the Purchase order line status is Released to Warehousing
- Infor LN defaults the conformance code from the Purchase Order Lines (tdpur4101m000) session.
- Infor LN defaults the conformance document register lines linked to the conformance code. (For more information, see the number of documents to be provided for a lot and serialized item.)
- The default Document status is open.
- Specify the document in the document number field. Infor LN sets the Document Status to Pre-Registered once the document is specified.

Step 5:

After the document verification, you can set the document status to:

- Pre-approved, if the document is conforms to the specifications.
- Not Pre-approved, if the document does not conform to the specifications.
- Cancelled

Step 6:

In the Warehouse Receipt (whinh3512m000) session, confirm the receipt.

Step 7:

In the Warehouse Inspection (whinh3622m000) session:

- Review the conformance code in the conformance reporting field. Infor LN defaults this code after the approved purchase order is processed in Warehousing.
- Click Details to verify the conformance documents linked to the code.

Note The document accepted check box in this session is disabled.

Step 8:

In the Inspection Order (qmptc1100m100) session, for the inspection order test data lines, the document number is defaulted from the conformance register .

Step 9:

If the document number specified for the test data line matches the document number in the conformance document register, the status is set to Matched (Pre-Inspection).

Note If the document number specified is different from the document specified in the Conformance Documentation Register (qmptc1650m000) session, Infor LN overwrites the document number in the conformance document register with the document number specified for the inspection order and sets the document status to Matched(Inspection).

Step 10:

In the Inspection Order (qmptc1100m100) session, specify the test result and complete the inspection order. The test results are updated on the conformance register.

Step 11:

Complete and process the order inspection in the Order Inspection (qmptc1620m000) session.

Step 12:

In the Warehouse Inspection (whinh3622m000) session, review the **Conformance Documentation Accepted** checkbox, for each warehouse inspection line, set to checked, by Infor LN. Infor LN checks for this conformance, before the warehouse inspection order is processed in Warehousing.

Implementing pre-dispatch registration for partial receipts

When a purchase order line is linked to conformance register for pre-dispatch registration, the conformance register is created for the entire purchase order line quantity.

In the Inspection Order (qmptc1100m100) session, the test data lines are created based on the selection of the **One Document Per Lot** or the **One Document Per Serial** check box in the Conformance Documents (qmptc0191m000) session.

During actual receipt, warehouse inspection details are updated on the conformance register, linking the register to the receipts.

Incase of a partial receipt, the lines that are not linked to the receipt can be viewed as a separate set (of records), in the register . During the next receipt, these lines are linked to the new receipt. This process is repeated until all the lines (not cancelled or not-pre approved) are linked to the receipts.

You can view all the receipt / open lines for an order in the Conformance Documentation Register Documents - By Order, Order Line (qmptc1551m000) session.