Training Guide

QAD Item Attributes and Quality Control

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Change Summary

The following table summarizes significant differences between this document and the previous version.

Date/Version	Description	Reference
April 2016/v2016 EE	Rebranded for QAD 2016 EE	--
April 2015/v2015 EE	Initial release	--

About This Course

Course Description

This class is designed to train students in QAD Item Attributes and Quality Control. At the end of the class, students will gain sufficient experience and knowledge to lead and support a high-level conference room pilot or implement a test or a training environment.

Course Objectives

By the end of this class, students will:

- Obtain competency to demonstrate QAD Item Attributes and Quality Control.
- Gain sufficient experience and knowledge to lead and support a high-level conference room pilot or implement a test or a training environment.

Audience

The target users for Item and Lot Attributes include:

- Professionals responsible for master data who define and manage the usage of attributes for items and item lots.
- Material Managers and Quality Control Managers responsible for managing materials based on the conformance and/or characteristics for inventory lots.
- Buyers, Customer Service Representatives, and Production Schedulers responsible for managing deviations for the acceptance of materials received from suppliers, issued to production, and shipped to customers.

The target users for Quality Control include:

- Quality Engineering and Quality Control Professionals responsible for managing quality specifications
- Quality Control Technicians and Quality Control Managers responsible for recording, approving, and reporting quality results data.

Prerequisites

In order to obtain maximum benefit from this class, an understanding of how to use core QAD functions for master data, purchase orders, work orders, Advanced Repetitive, and sales orders is required to complete the exercises for this class.

Virtual Environment Information

The hands-on exercises in this book should be used with the latest Enterprise Edition learning environment. When prompted to log in, specify demo for user ID and qad for password.

Additional Resources

If you encounter questions on QAD software that are not addressed in this book, several resources are available. The QAD corporate Web site provides product and company overviews. From the main site, you can access the QAD Learning or Support site and the QAD Document Library. Access to some portions of these sites depends on having a registered account. http://www.qad.com/

QAD Learning Center

To view available training courses, locations, and materials, use the QAD Learning Center. Choose Education under the Services tab to access this resource. In the Learning Center, you can reserve a learning environment if you want to perform self-study and follow a training guide on your own.

QAD Document Library

To access release notes, user guides, training guides, and installation and conversion guides by product and release, visit the QAD Document Library. Choose Document Library under the Support tab. In the QAD Document Library, you can view HTML pages online, print specific pages, or download a PDF of an entire book.

To find a resource, you can use the navigation tree on the left or use a powerful cross-document search, which finds all documents with your search terms and lets you refine the search by book type, product suite or module, and date published.

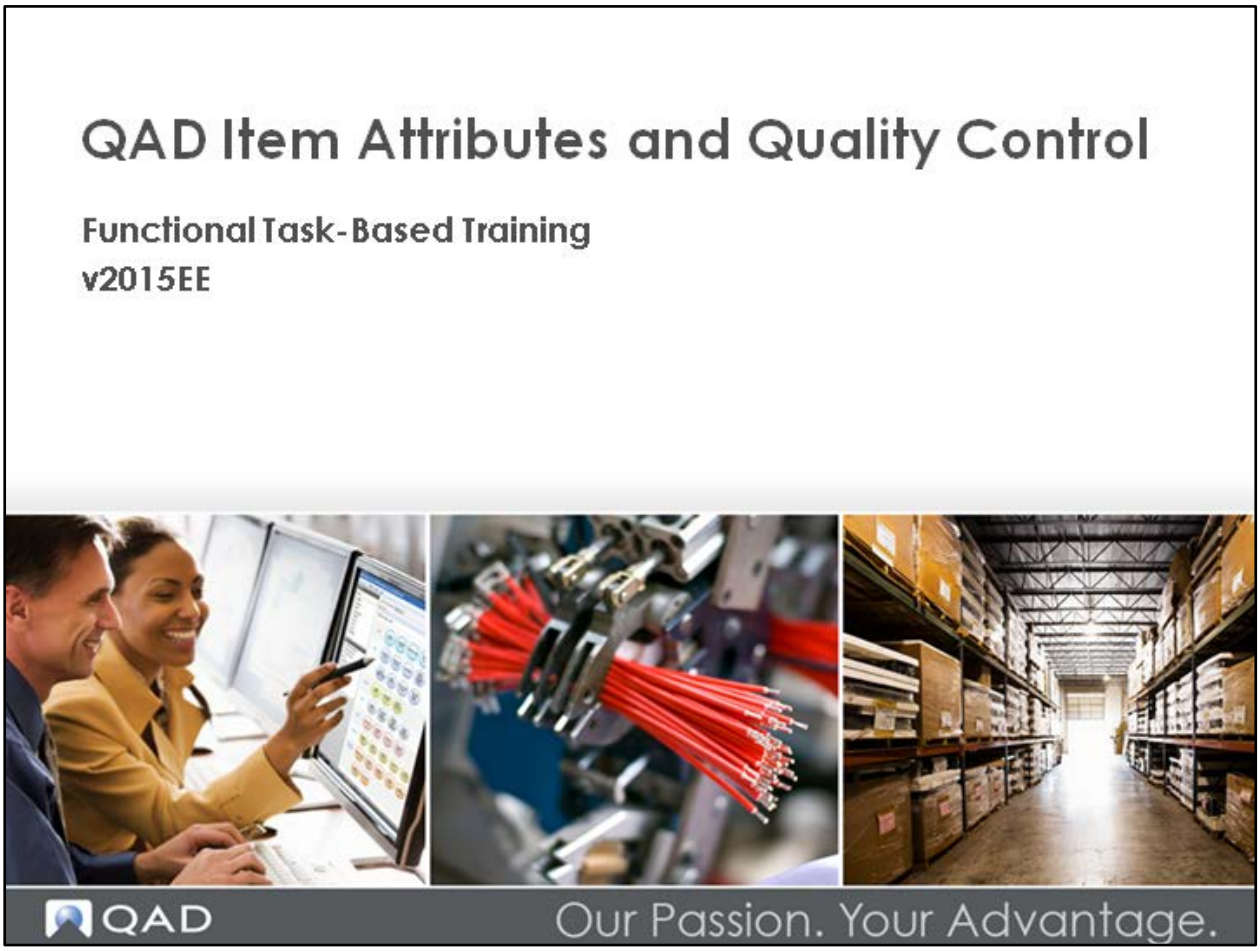
QAD Support

Support also offers an array of tools depending on your company's maintenance agreement with QAD. These include the Knowledgebase and QAD Forums, where you can post questions and search for topics of interest. To access these, choose Visit Online Support Center under the Support tab.

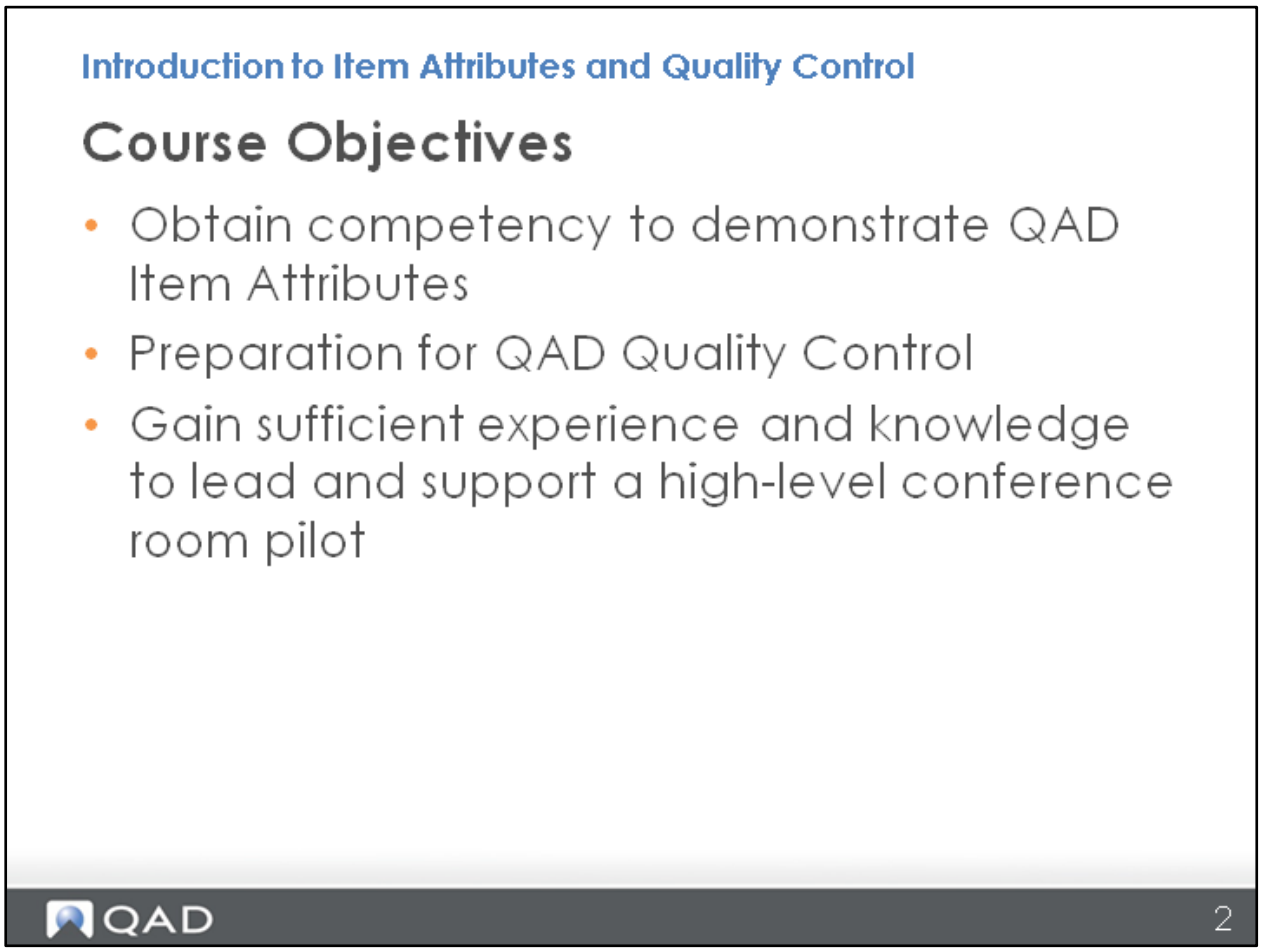
CHAPTER 1

Introduction to QAD IAQ

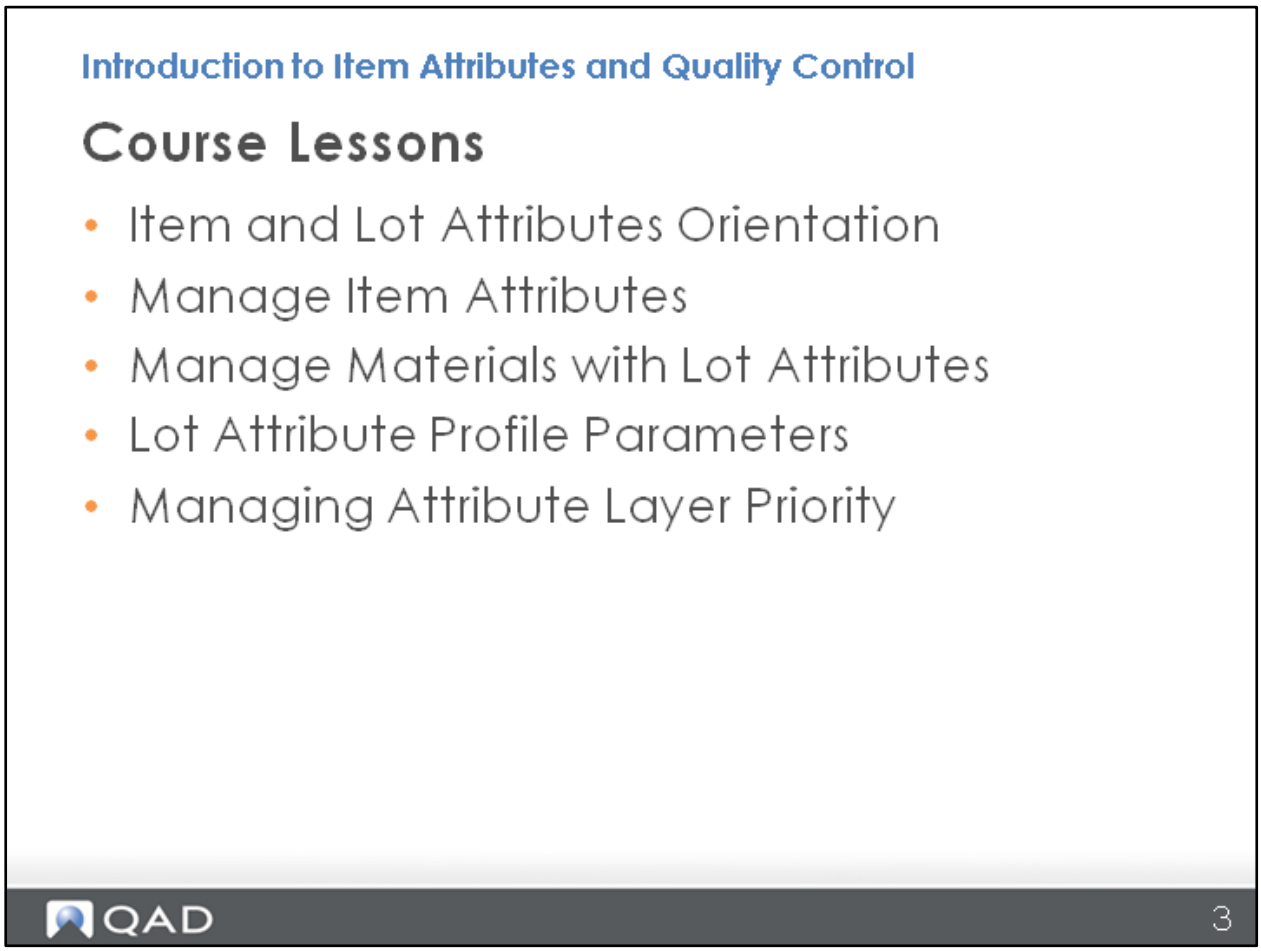
QAD Item Attributes and Quality Control



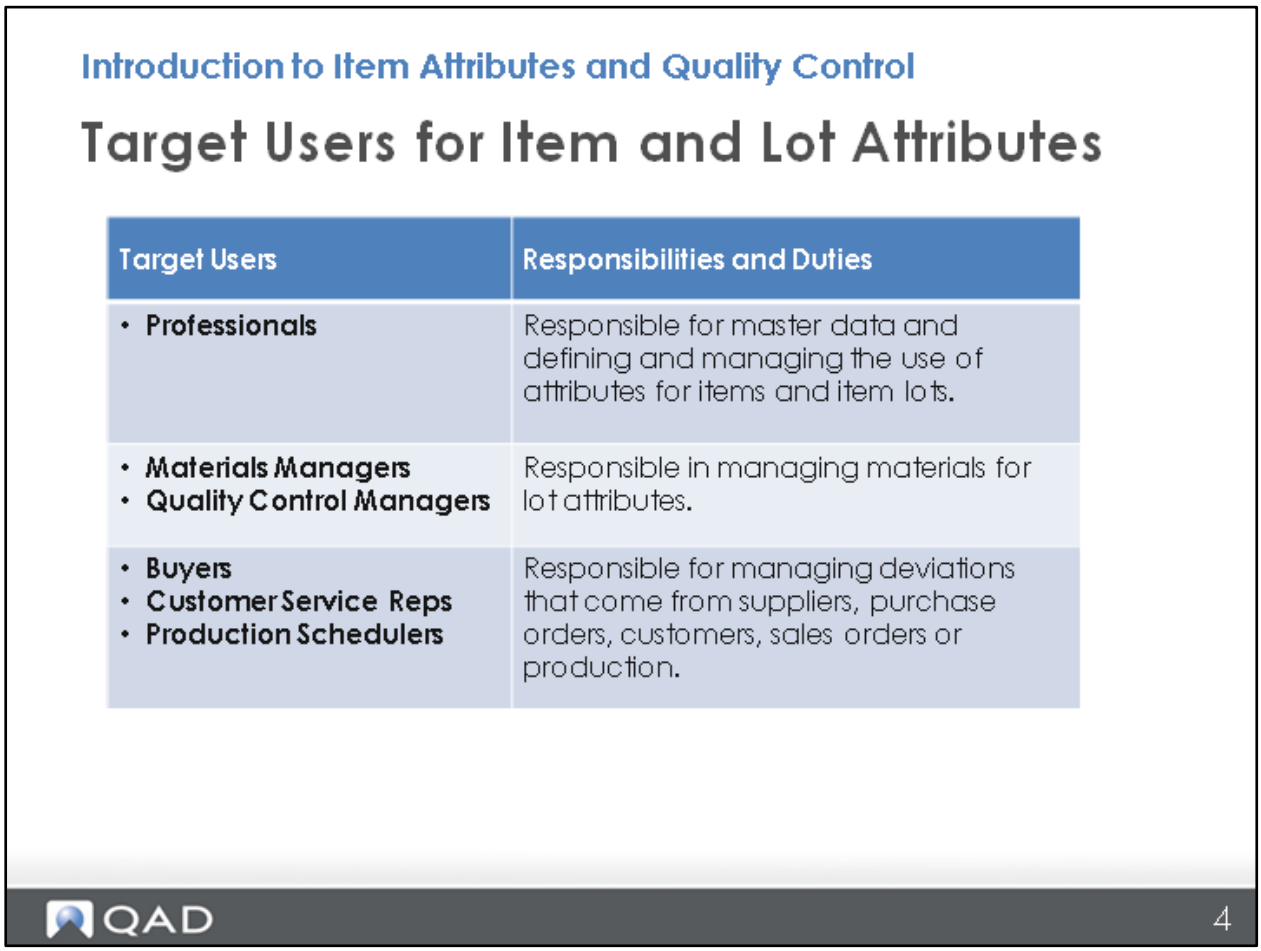
Course Objectives



Course Lessons



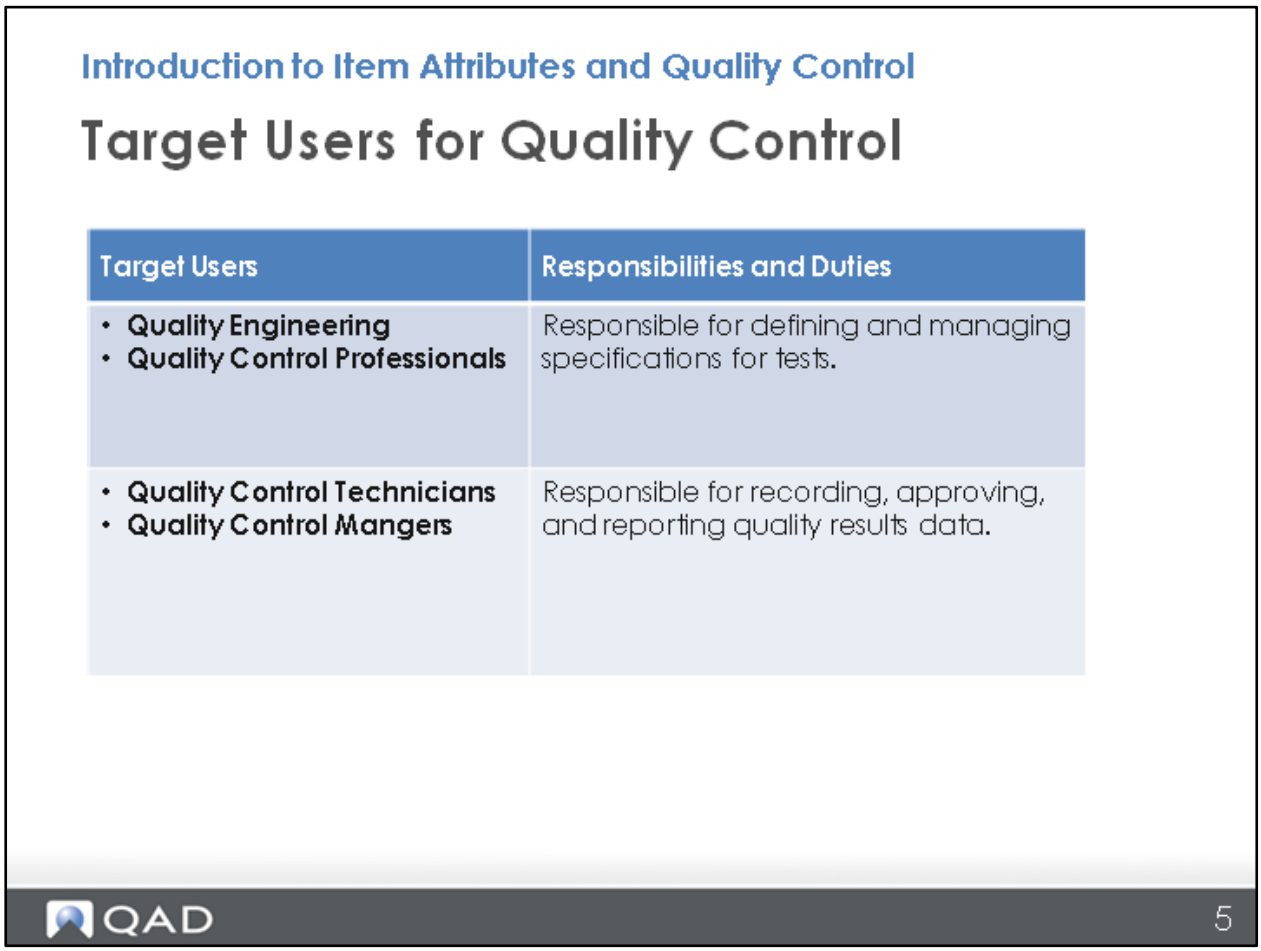
Target Users for Item and Lot Attributes



The target users for Item and Lot Attributes include:

- **Professionals.** Responsible for master data who define and manage the usage of attributes for items and item lots.
- **Material Managers and Quality Control Managers.** Responsible for managing materials for lot attributes.
- **Buyers, Customer Service Representatives and Production Schedulers.** Responsible for managing deviations that come from suppliers, purchase orders, customers, sales orders or production.

Target Users for Quality Control



The target users for Quality Control include:

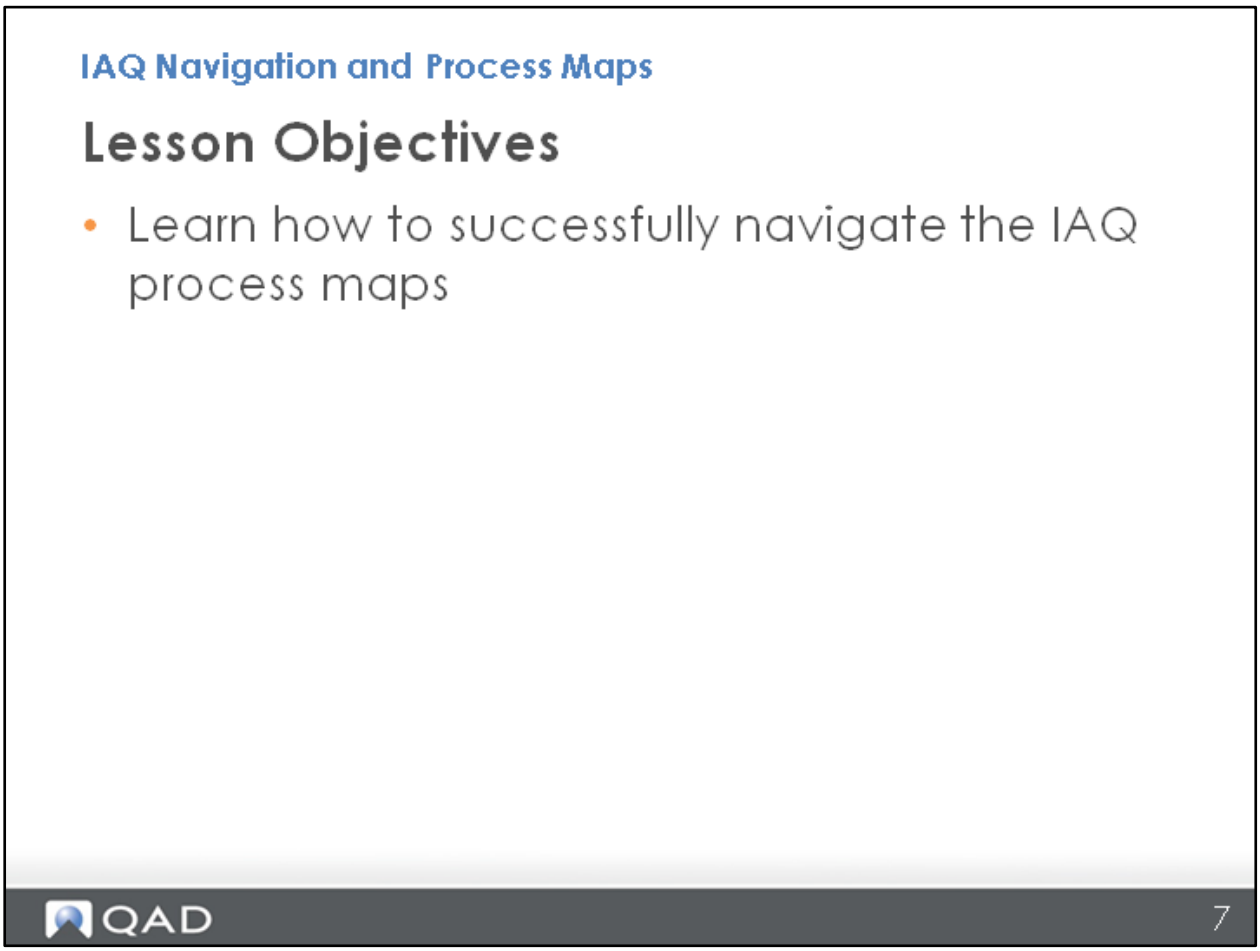
- **Quality Engineering and Quality Control Professionals .** Responsible for defining and managing specifications for tests.
- **Quality Control Technicians and Quality Control Mangers.** Responsible for recording, approving, and reporting quality results data.

CHAPTER 2

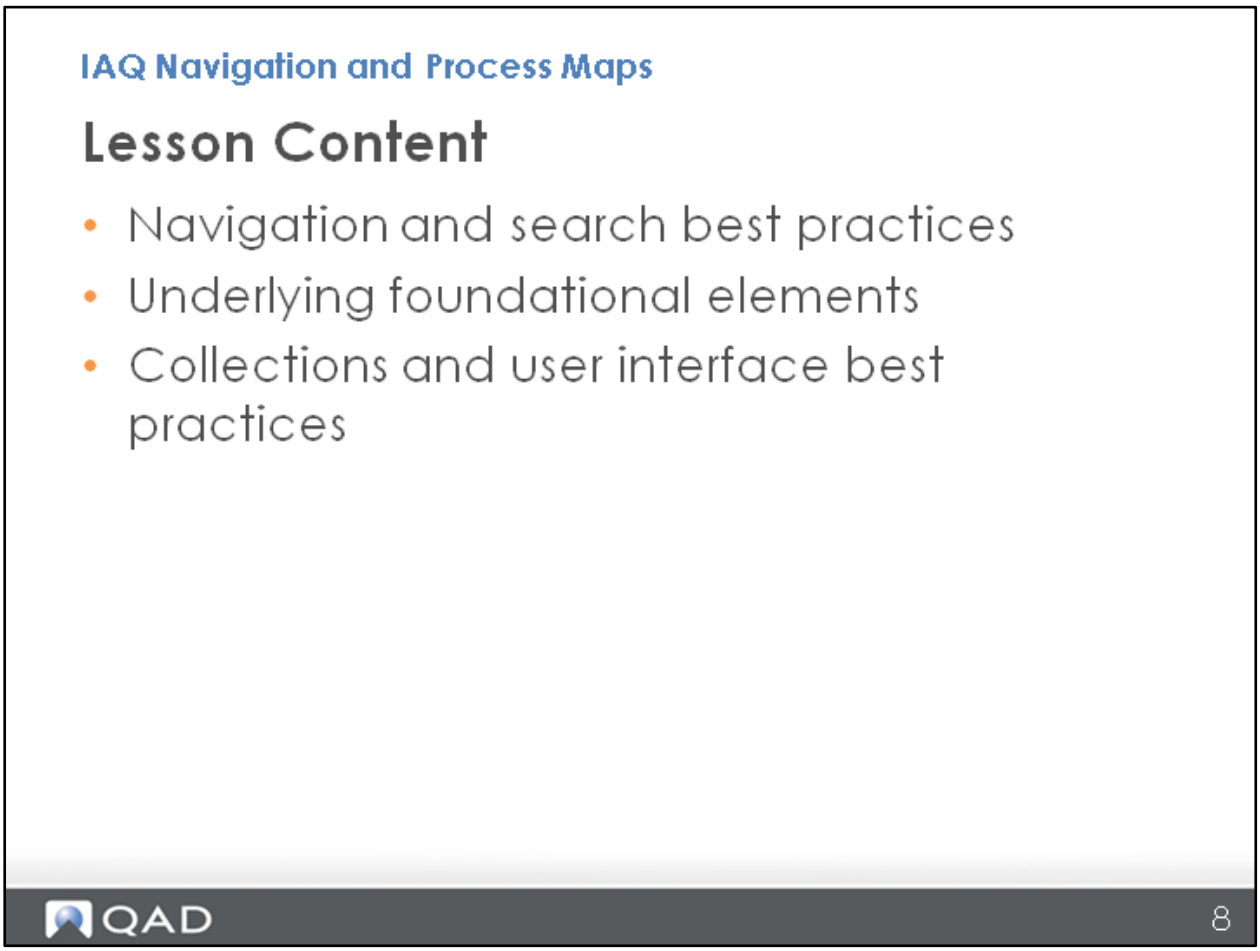
IAQ Navigation and Process Maps

IAQ Navigation and Process Maps

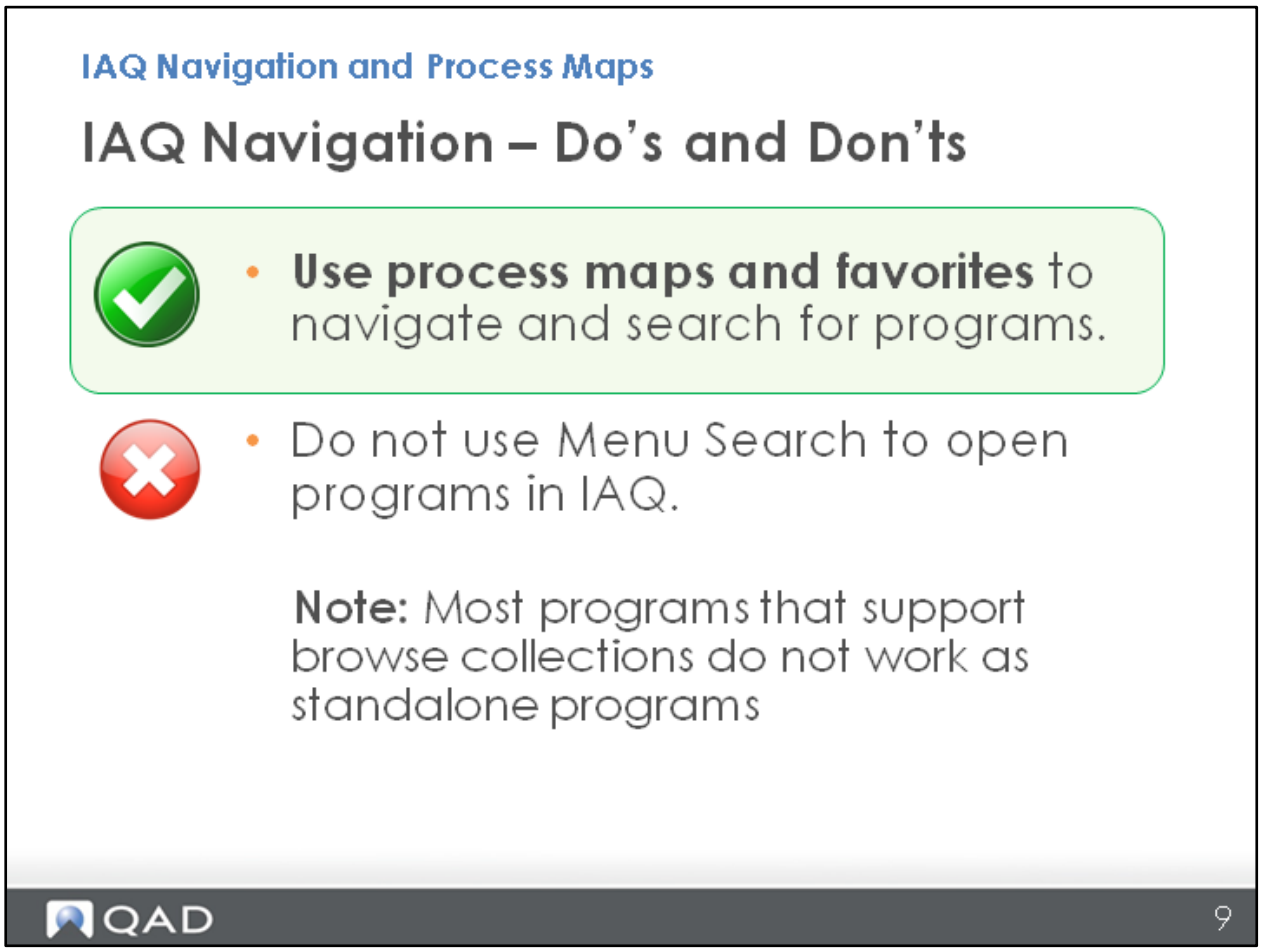
Lesson Objectives



Lesson Content



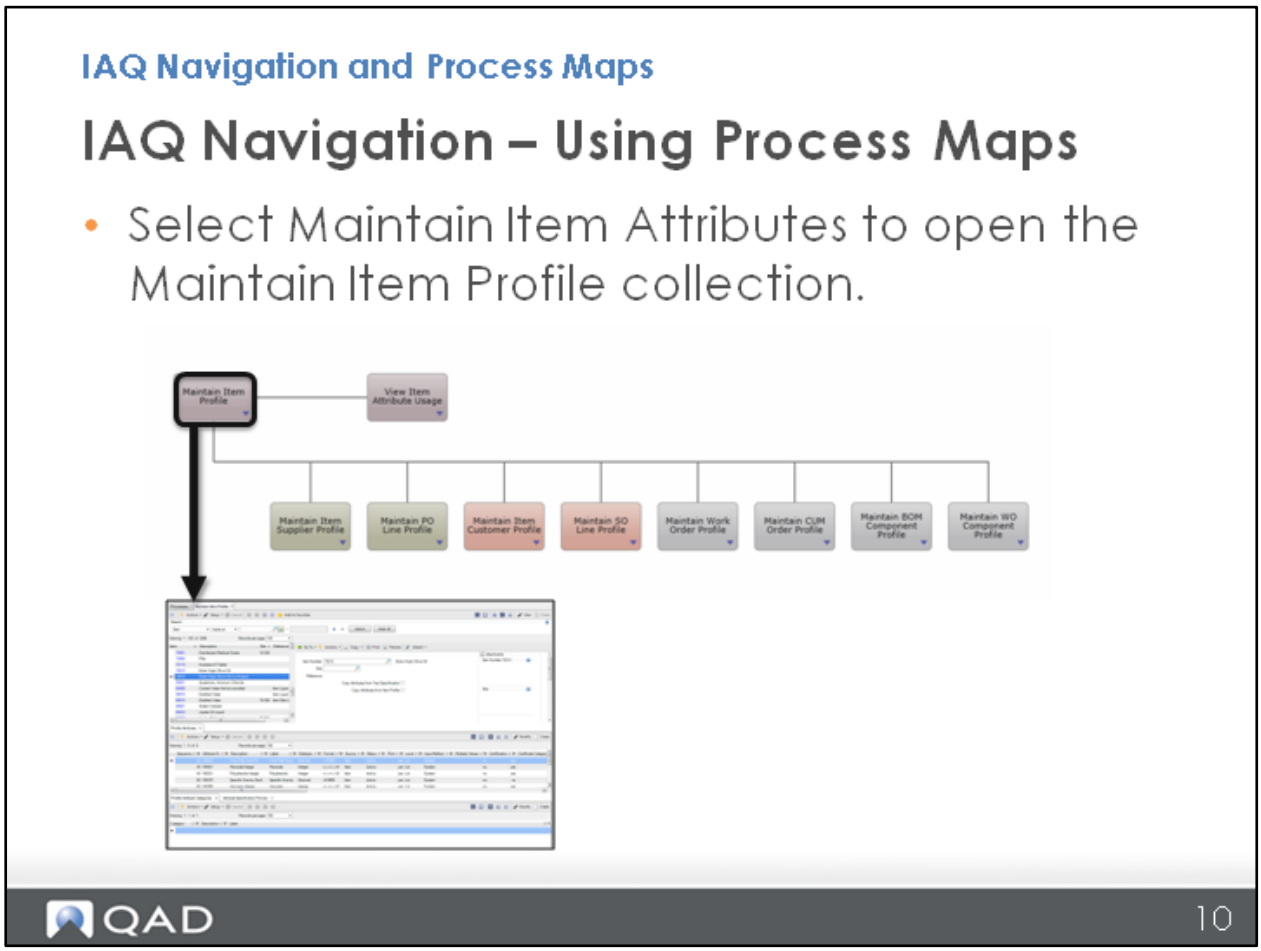
IAQ Navigation – Do's and Don'ts



To navigate through the programs and collections in IAQ, use the process maps included in QAD EE. The IAQ solutions are supported using browse collections and browses that are designed to be accessed from process maps or saved as favorites. Menu-level functions for item attributes and quality control should only be accessed from a browse collection. When selected from the .NET Applications search or using a character user interface, those menu level functions are not supported.

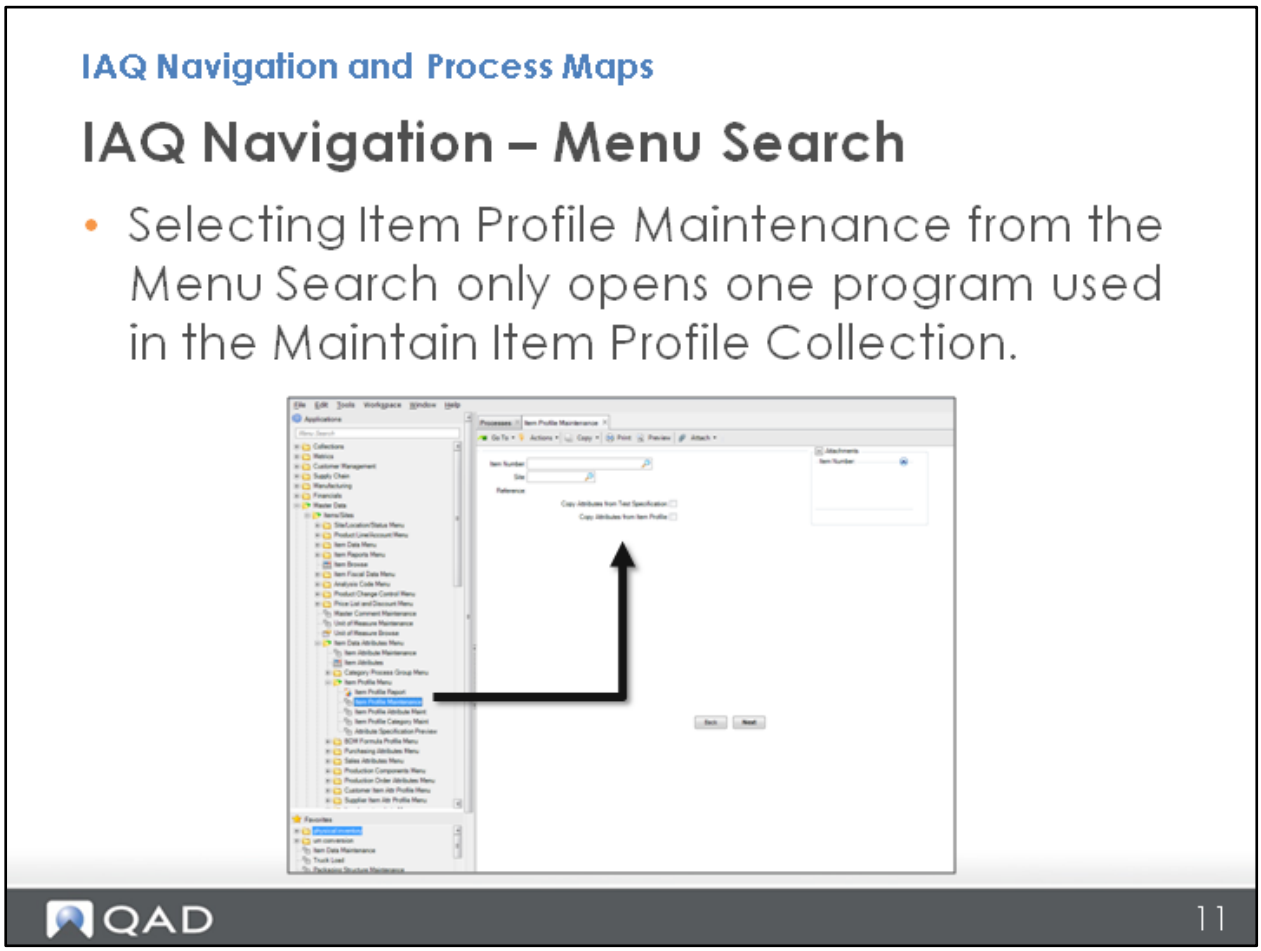
Note: Do not use Attribute Definition Maintenance (7.19.2, gpattrmt.p) to define item attributes. It is a specialized function that should only be used by qualified Information Technology personnel to define attributes for other applications other than Item Attributes and Quality Control.

IAQ Navigation – Using Process Maps



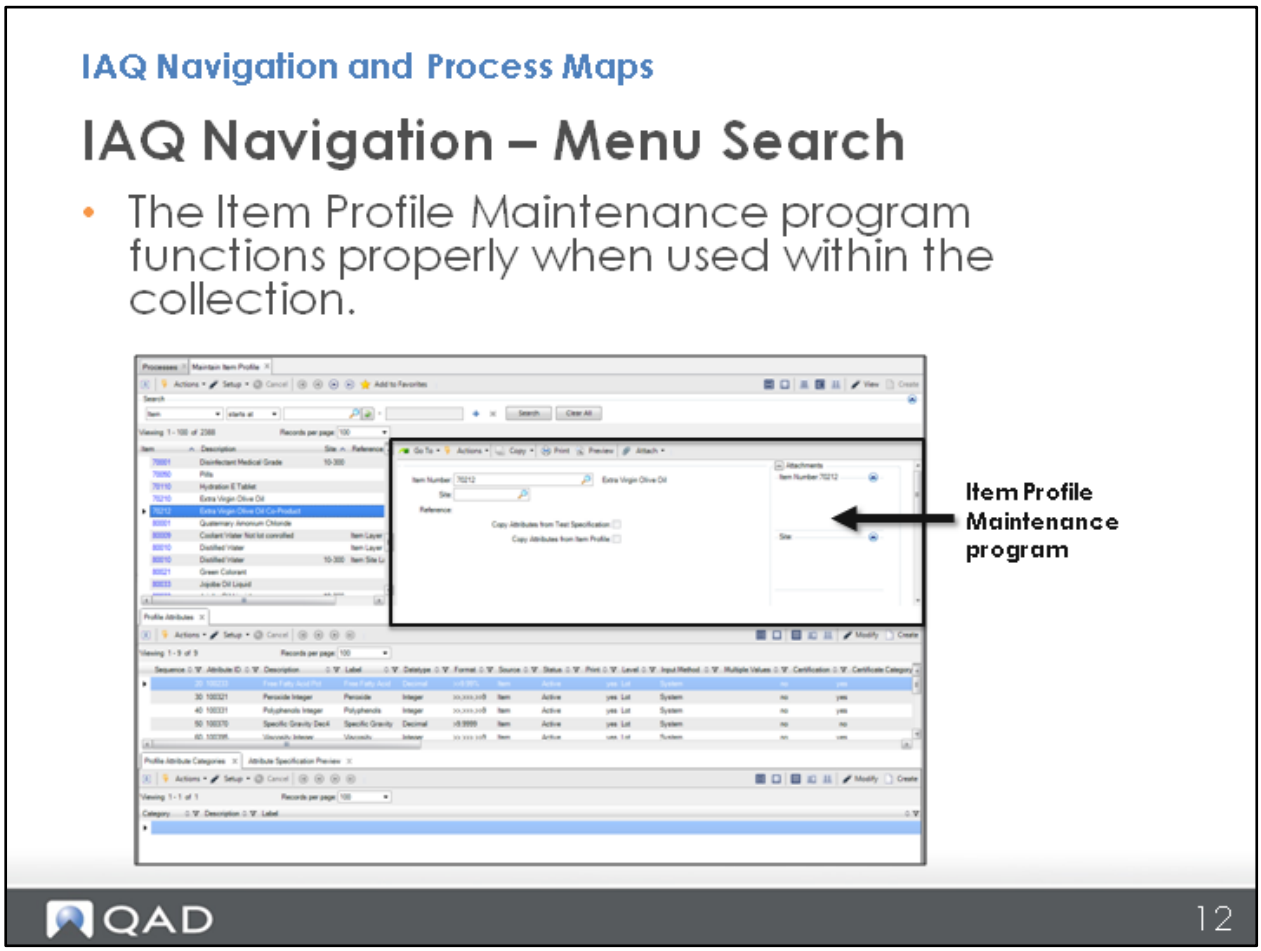
For example, if you select Maintain Item Attributes from the process map, the system opens the Maintain Item Profile collection, which contains the necessary IAQ functions and programs to maintain an item profile.

IAQ Navigation – Menu Search



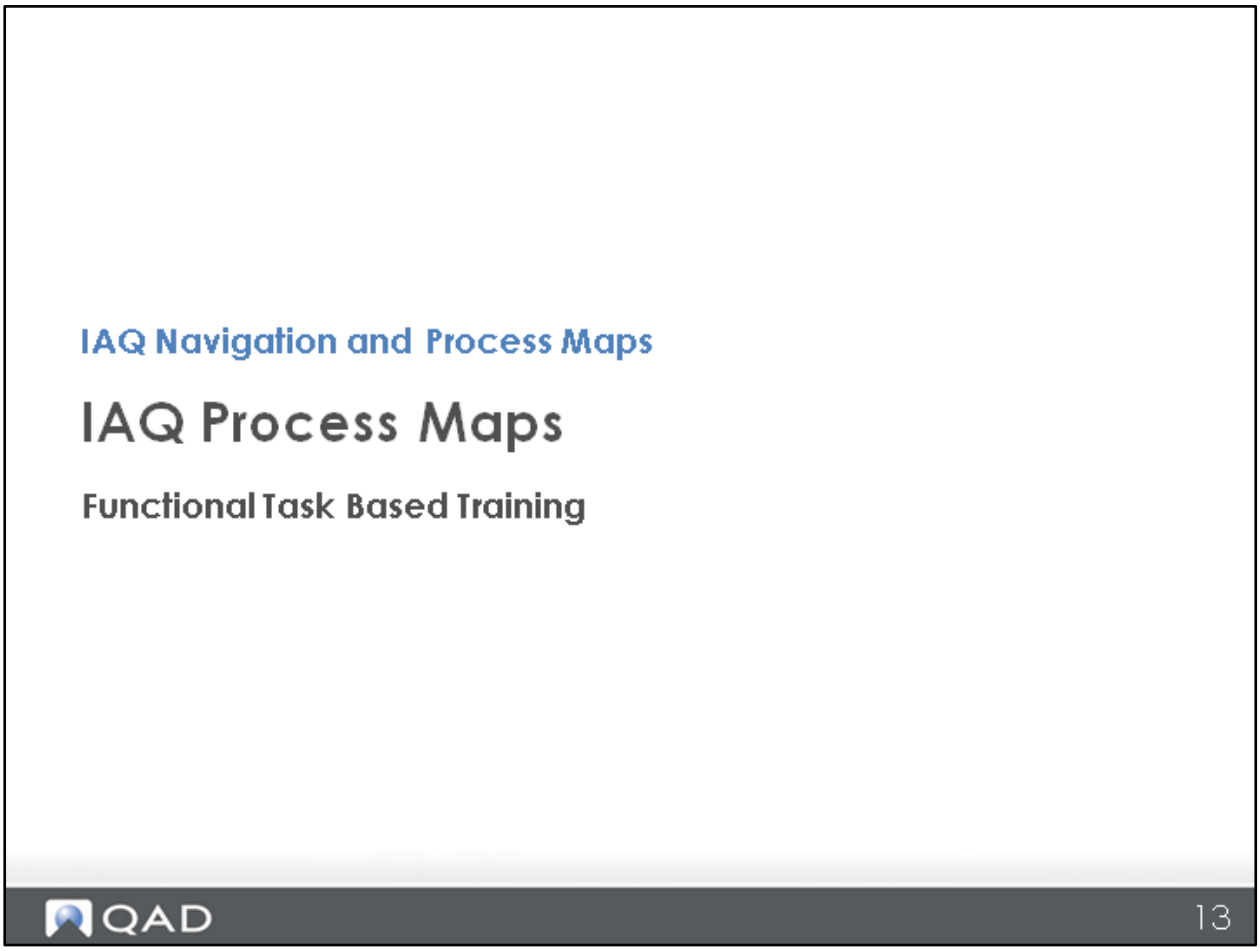
If you select Item Profile Maintenance from the Menu Search, the system will only open the Item Profile Maintenance program, which is only one program used in the Maintain Item Profile collection.

IAQ Navigation – Menu Search

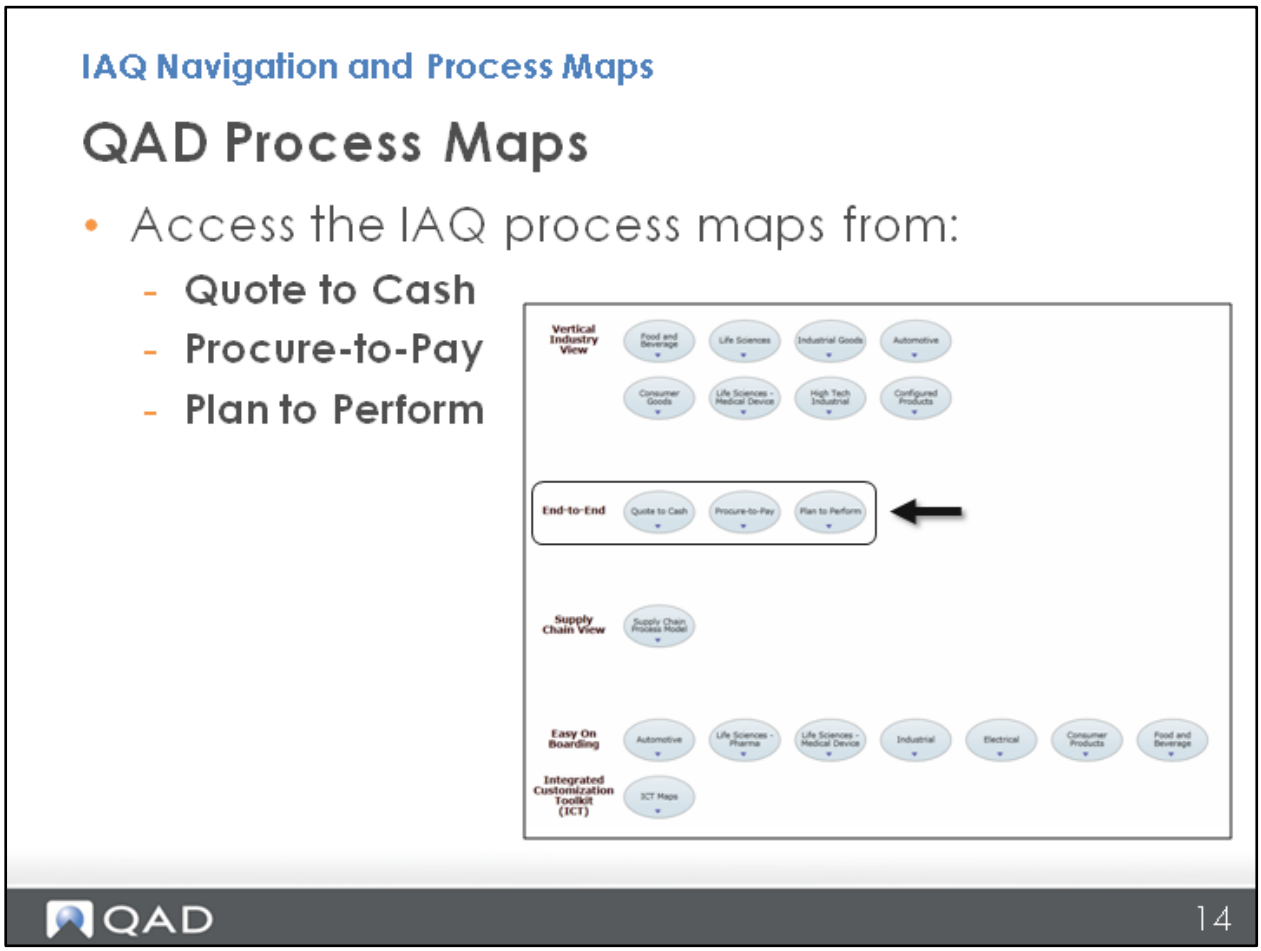


In the Maintain Item Profile collection, the Item Profile Maintenance program is used in the upper browse.

IAQ Process Maps

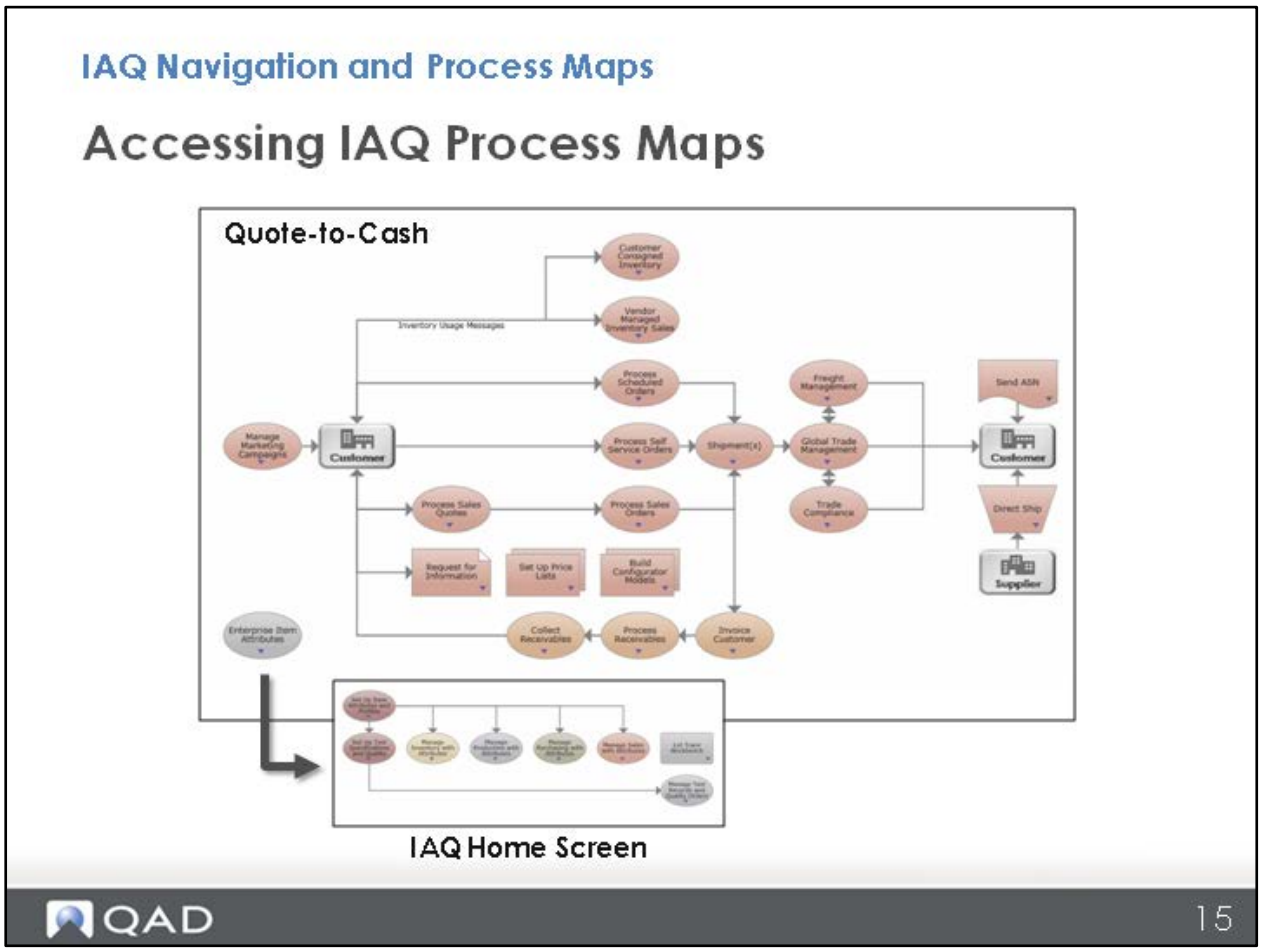


QAD Process Maps



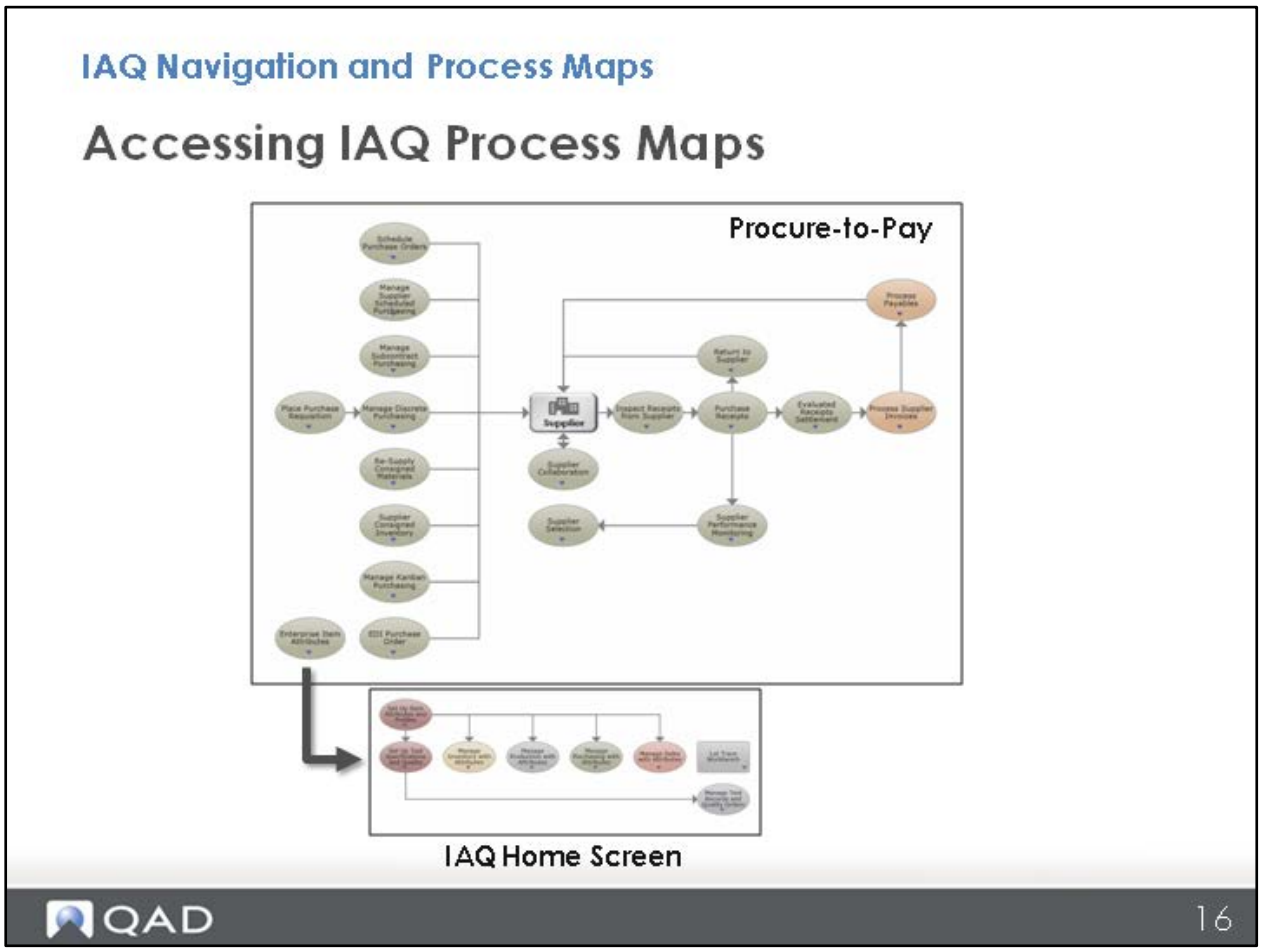
Process maps are the primary navigation tool for both Item Attributes and Quality Control. The process maps for Item Attributes and Quality Control are configured with the essential functions for inventory, purchasing, production, quality, and sales business cycles using attributes. Access the IAQ process maps from **Quote to Cash**, **Procure-to-Pay**, and **Plan to Perform**.

Accessing IAQ Process Maps



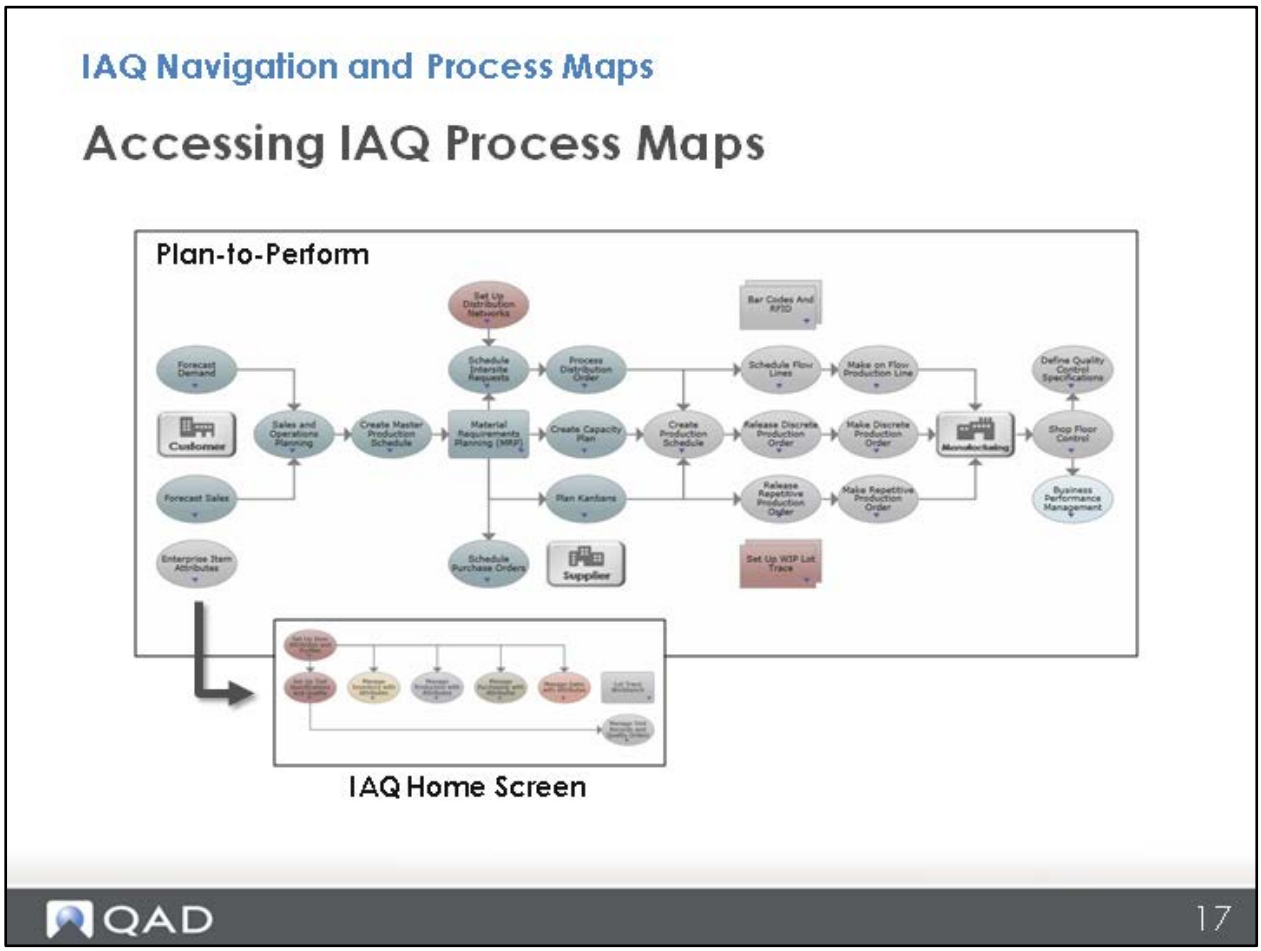
From the Quote to Cash process map, select Enterprise Item Attributes to access the IAQ home screen.

Accessing IAQ Process Maps



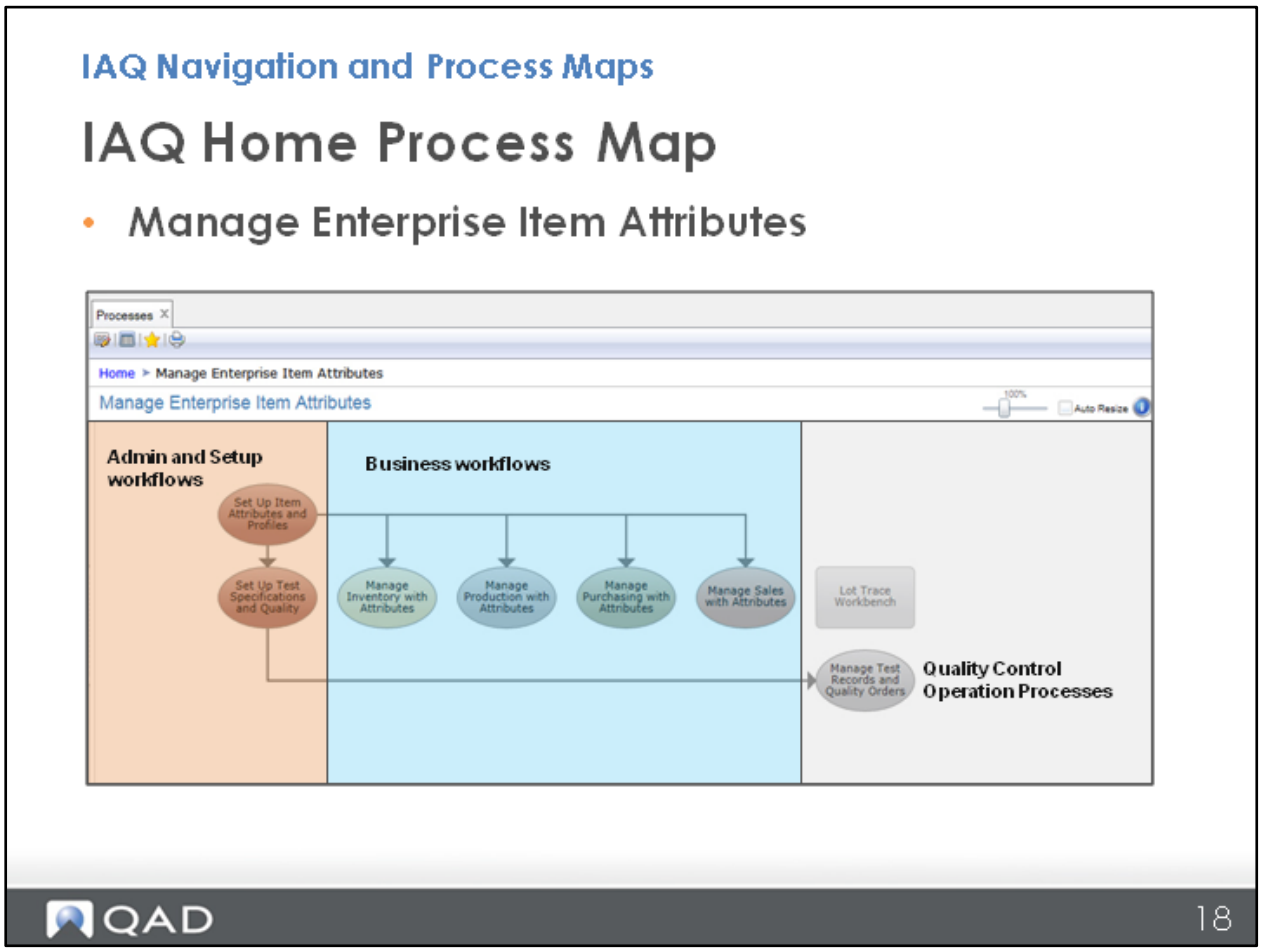
From the Procure-to-Pay process map, select Enterprise Item Attributes to access the IAQ home screen.

Accessing IAQ Process Maps



From the Plan-to-Perform process map, select Enterprise Item Attributes to access the IAQ home screen.

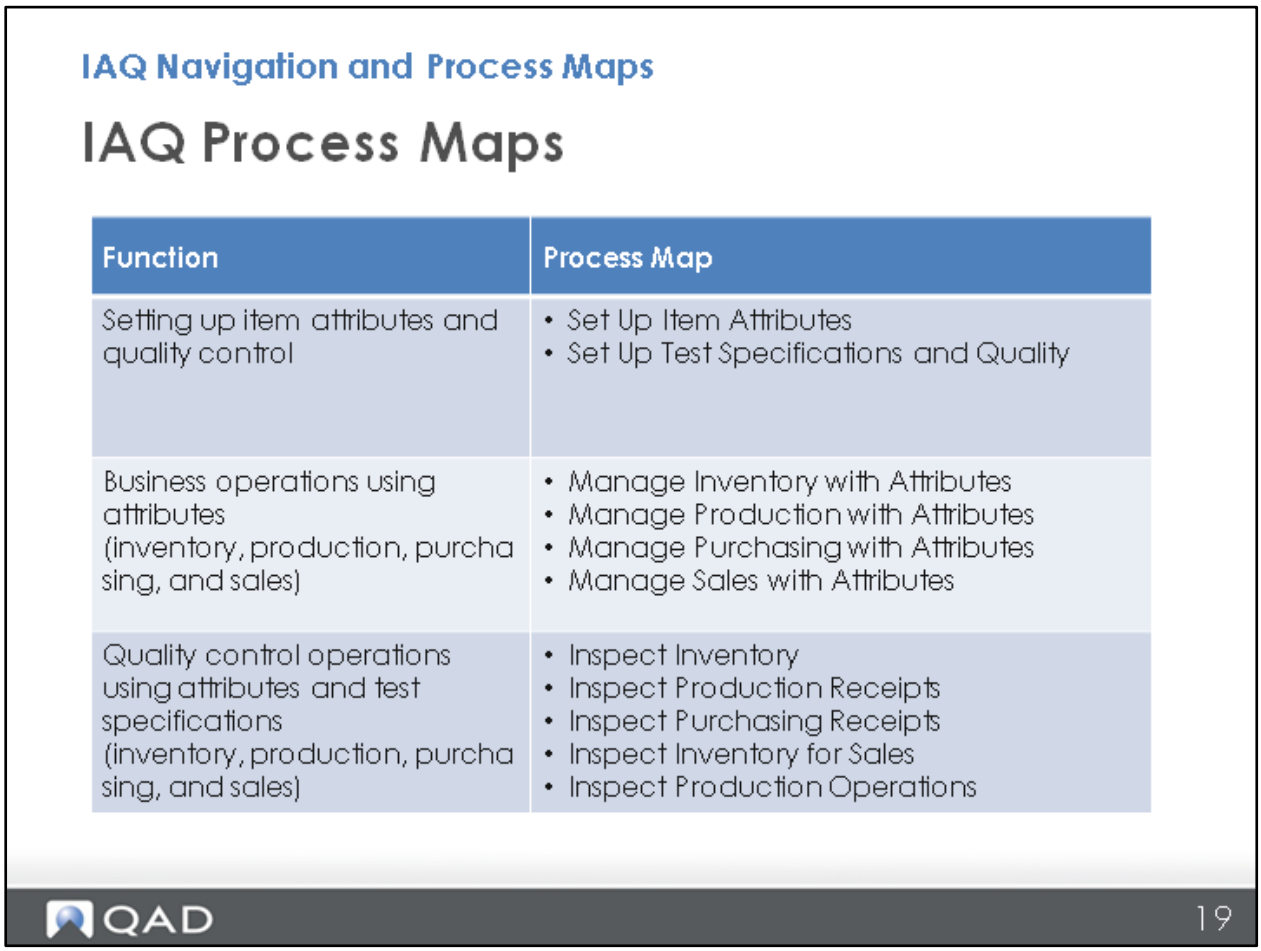
IAQ Home Process Map



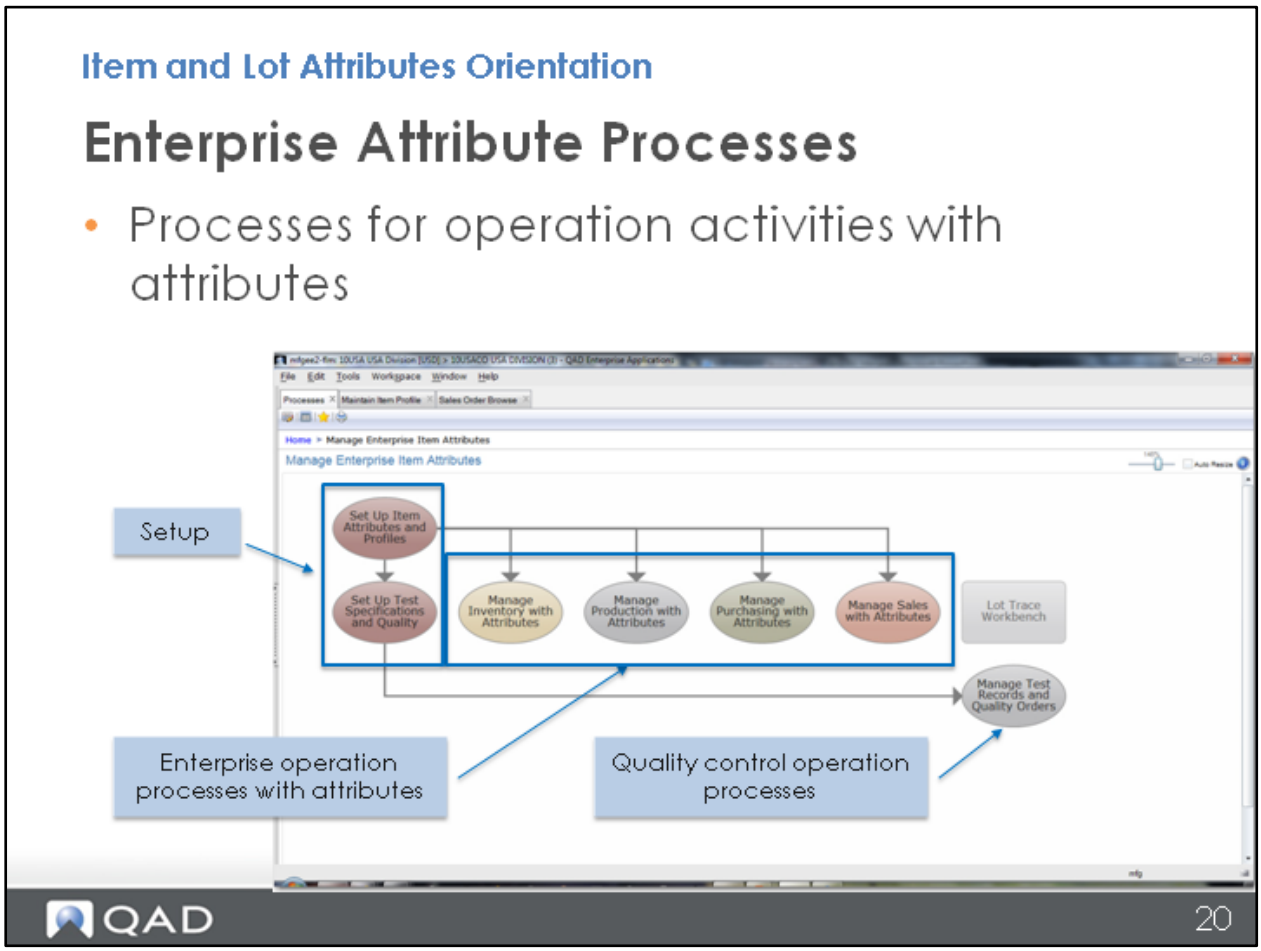
Manage Enterprise Item Attributes is the top level/home process map for IAQ. This process map is organized in the following workflows:

- **Administrative and Setup Workflows.** Include the Set Up Item Attributes and Profiles and Set Up Test Specifications and Quality programs.
- **Business Workflows.** Include the points of entry for inventory, purchasing, production, quality, and sales business cycles using attributes.

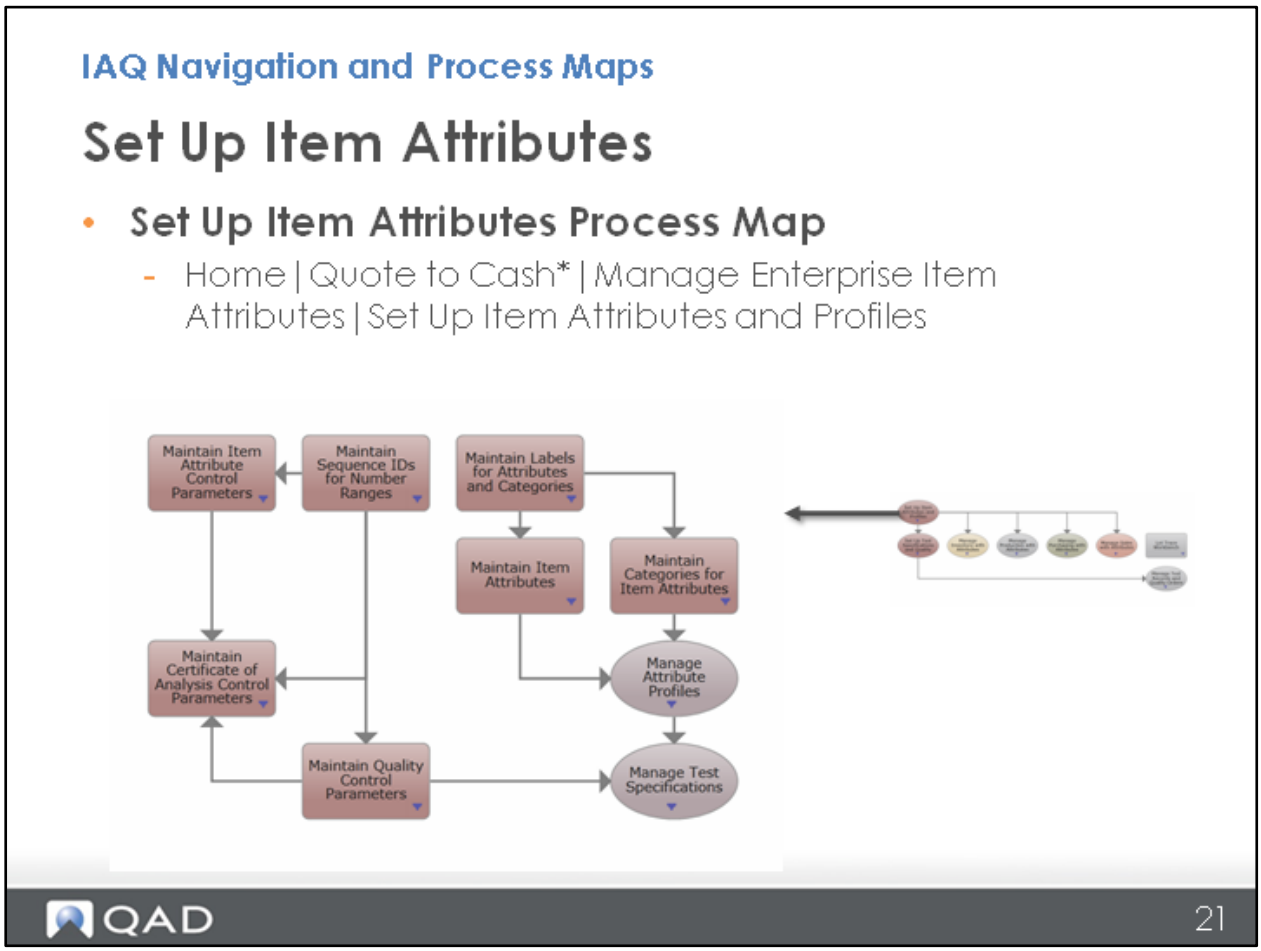
IAQ Process Maps



Enterprise Attribute Processes

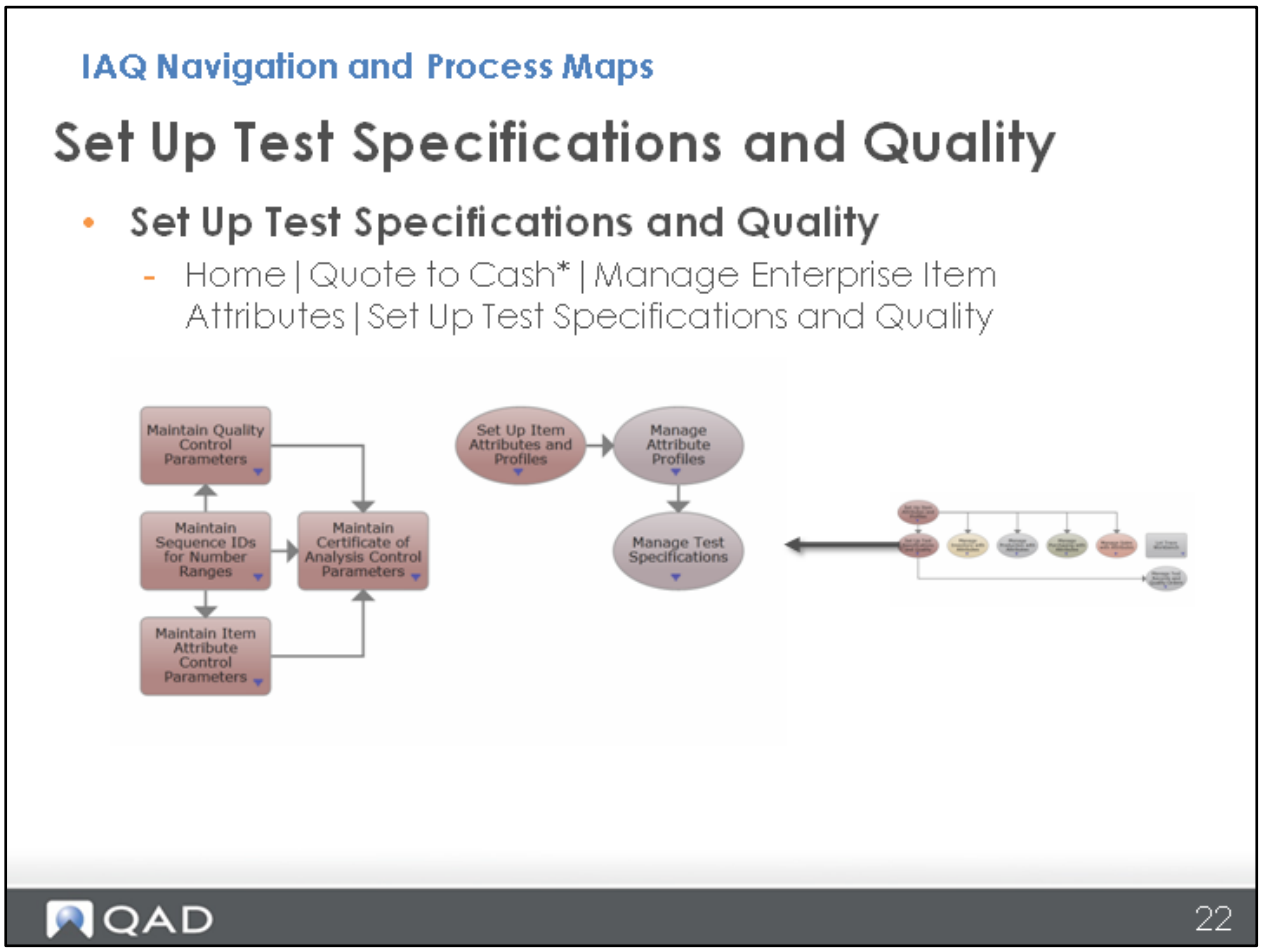


Set Up Item Attributes



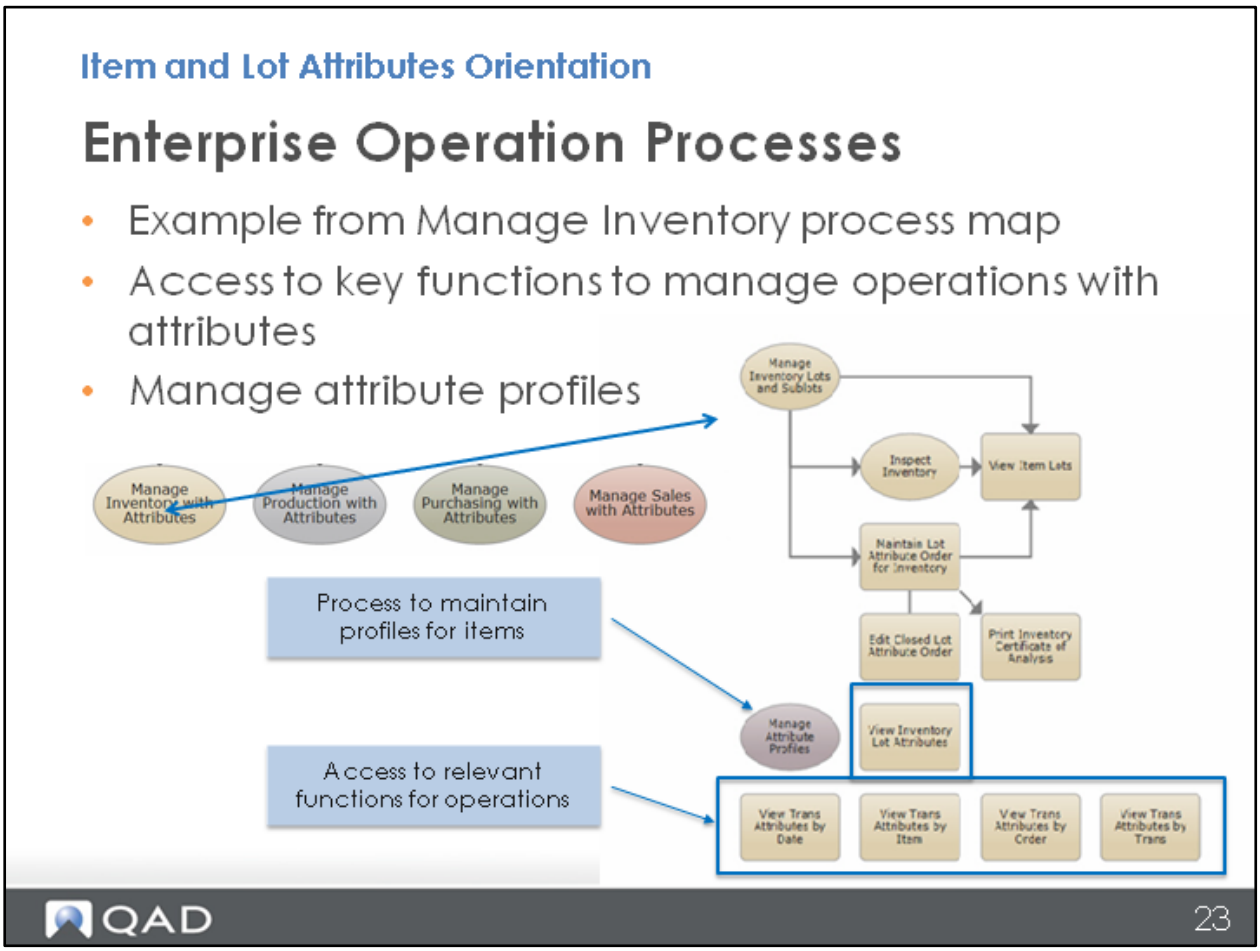
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Set Up Test Specifications and Quality



*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Enterprise Operation Processes

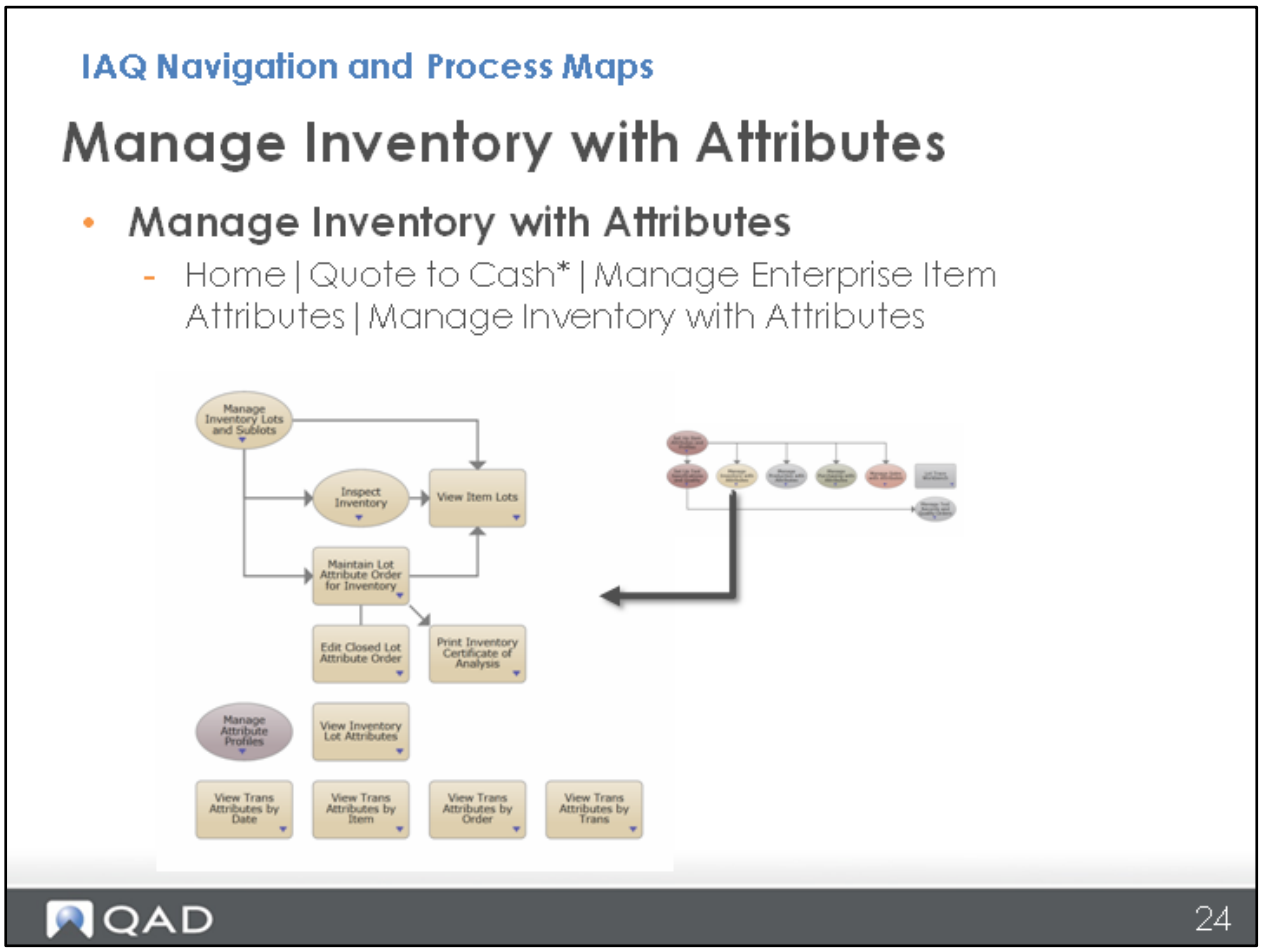


Within each of the four operational process maps for item attributes, you have access to be able to manage attribute profiles.

Each of the process maps also provide quick access to key functions to support operations.

This map to Manage Inventory with attributes has functions specifically related to managing inventory with lot attribute values.

Manage Inventory with Attributes



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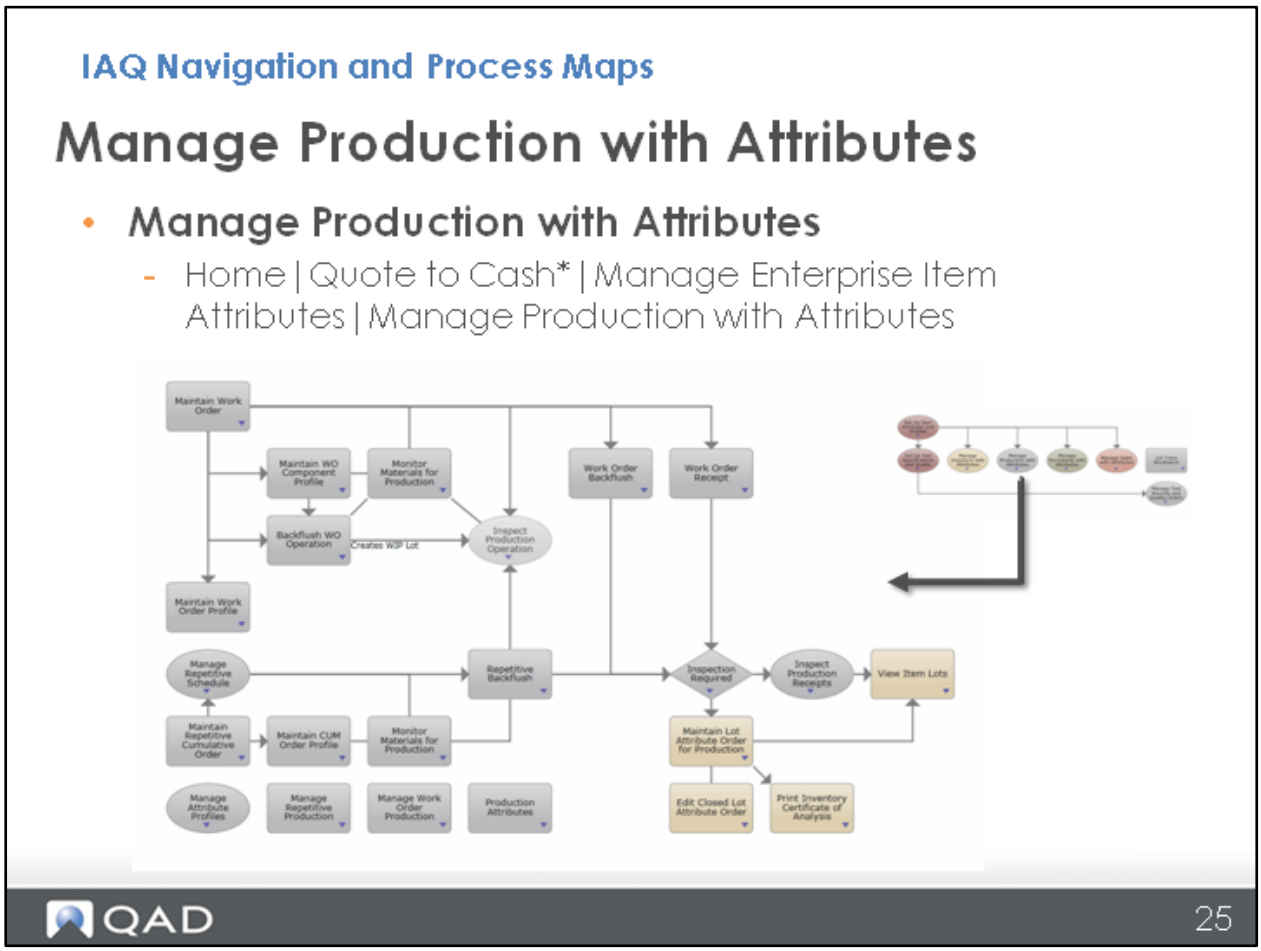
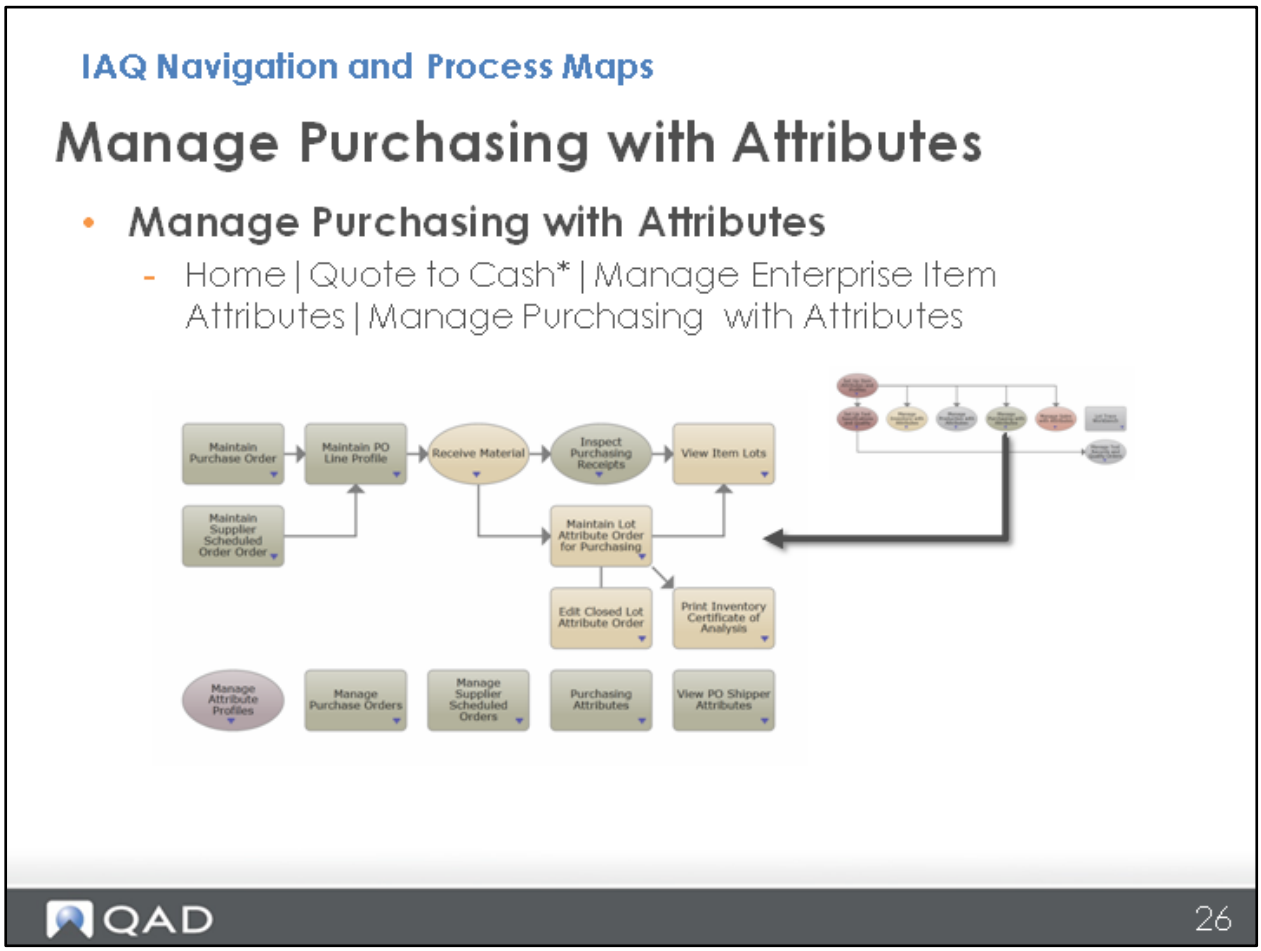
Manage Production with Attributes



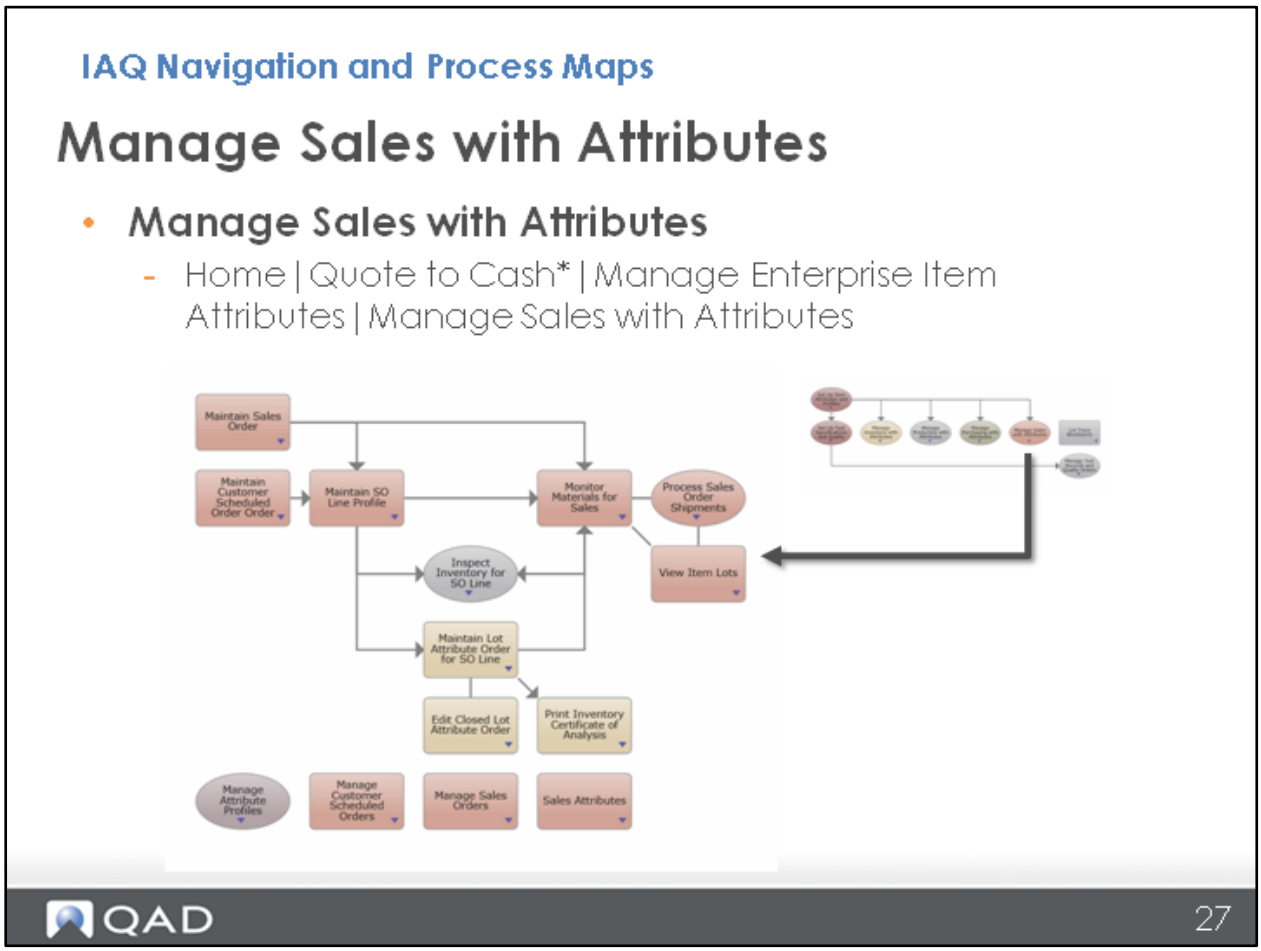
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Manage Purchasing with Attributes



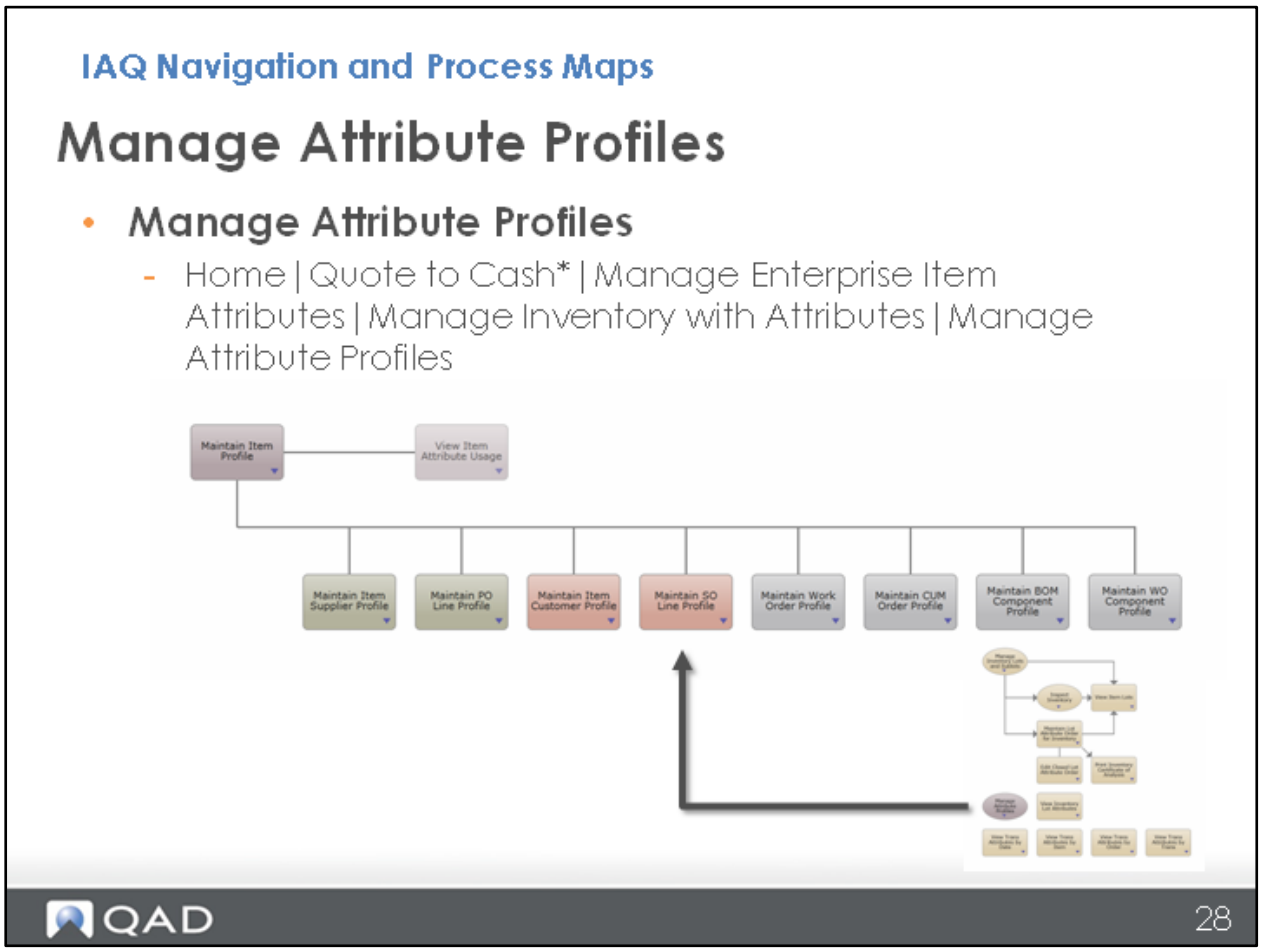
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Manage Sales with Attributes



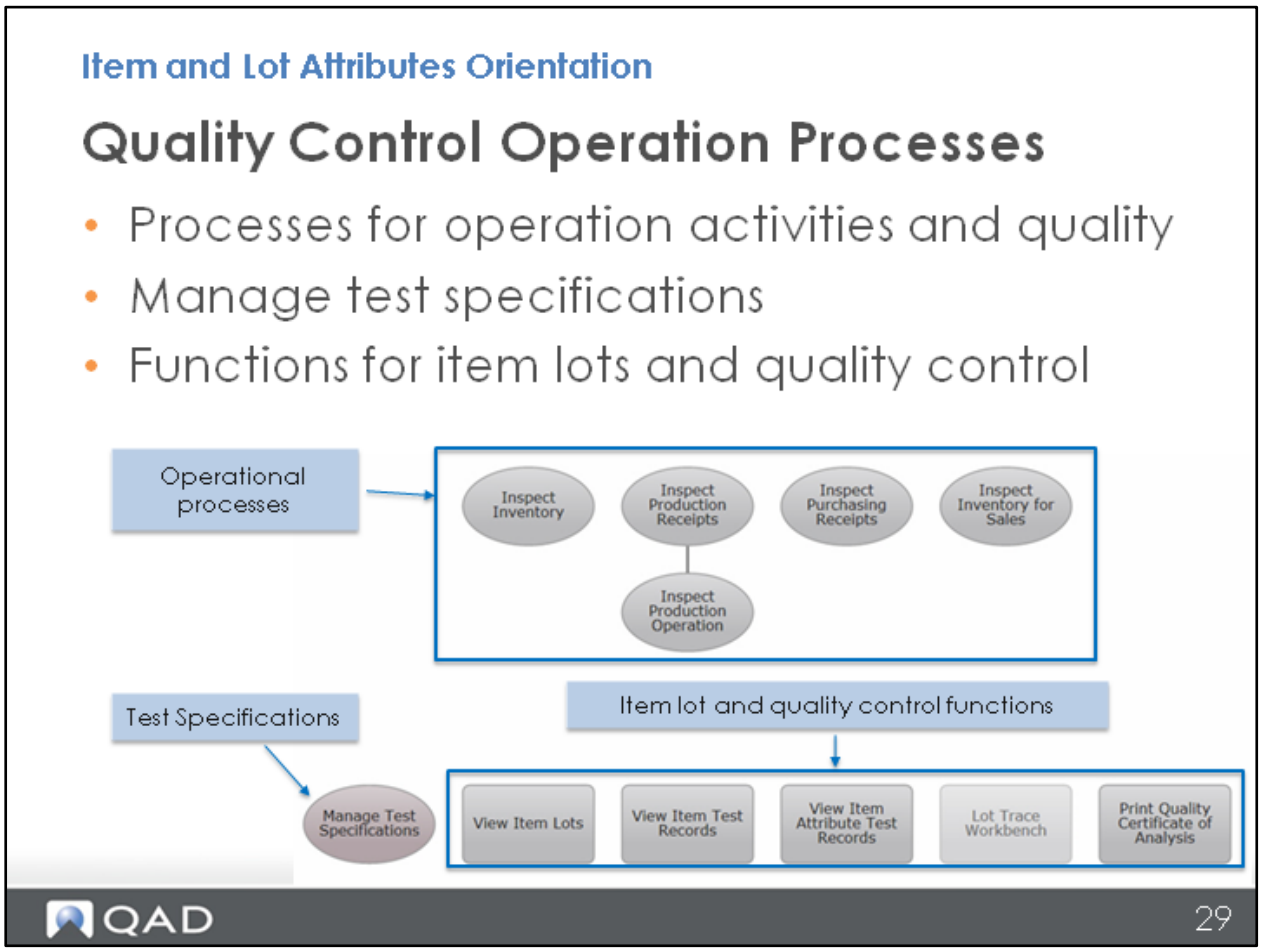
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Manage Attribute Profiles



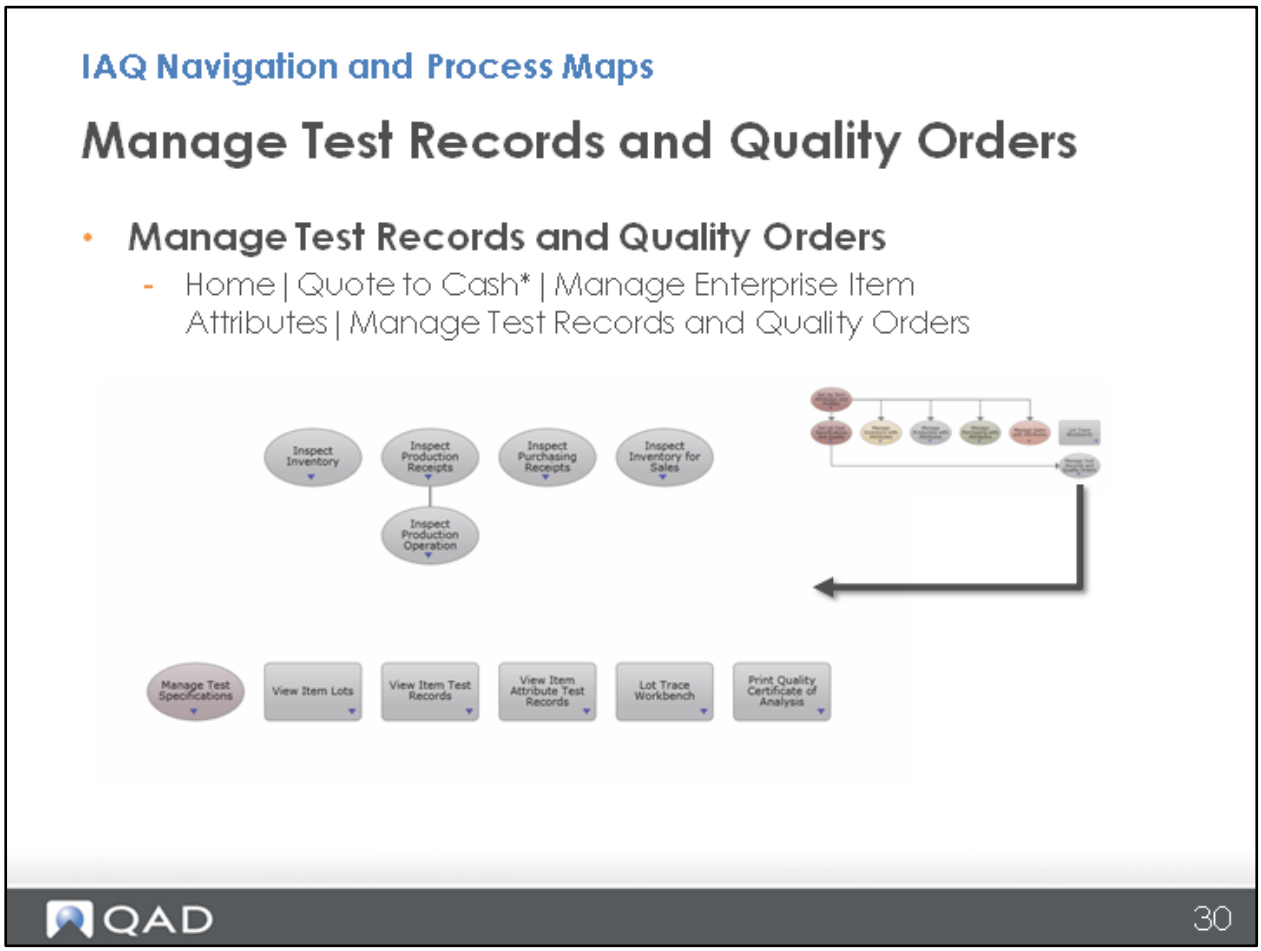
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Quality Control Operation Processes



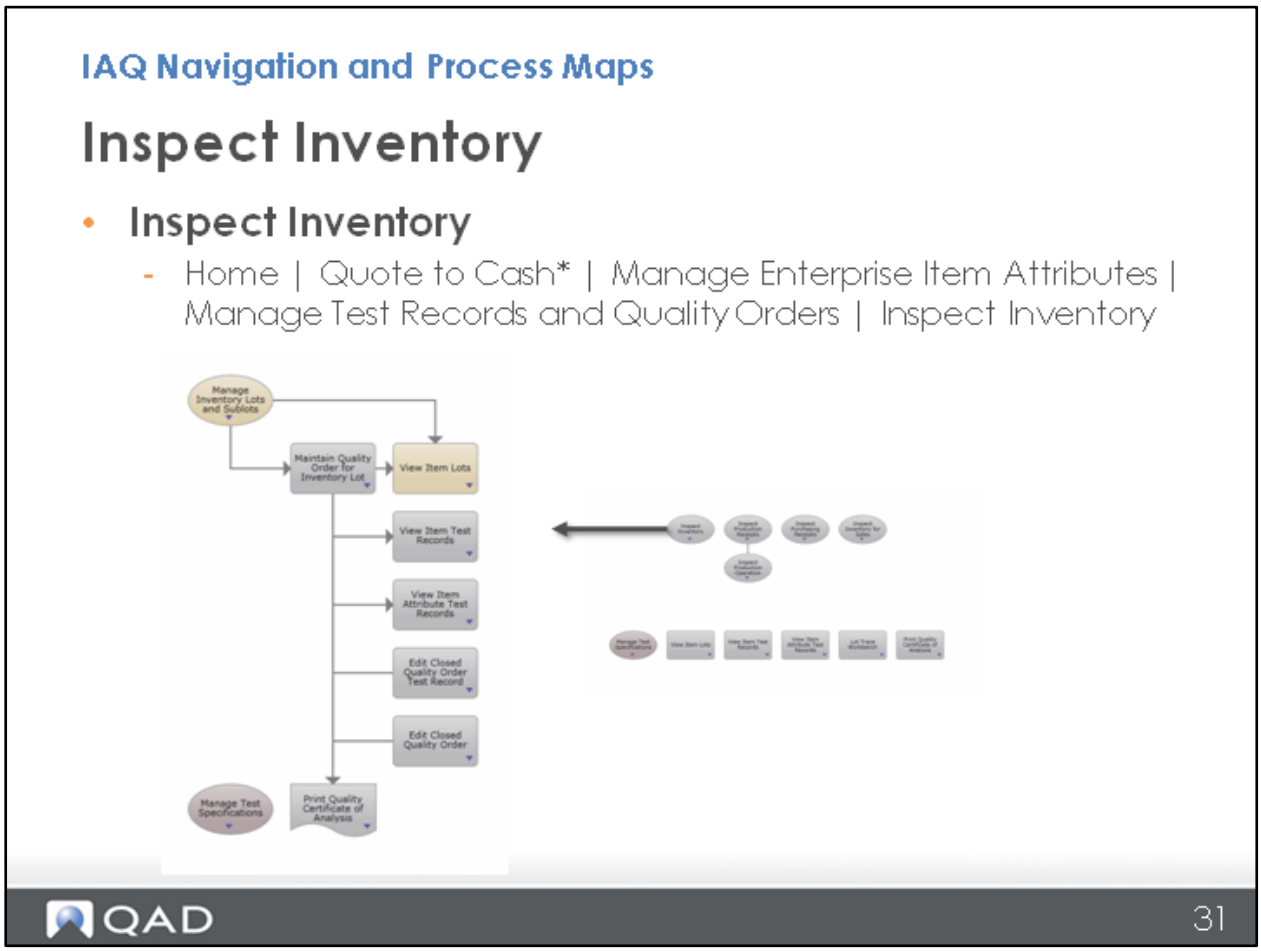
The process map for Test Records and Quality Orders provides access to manage test specifications, as well as quality control operations.

Manage Test Records and Quality Orders



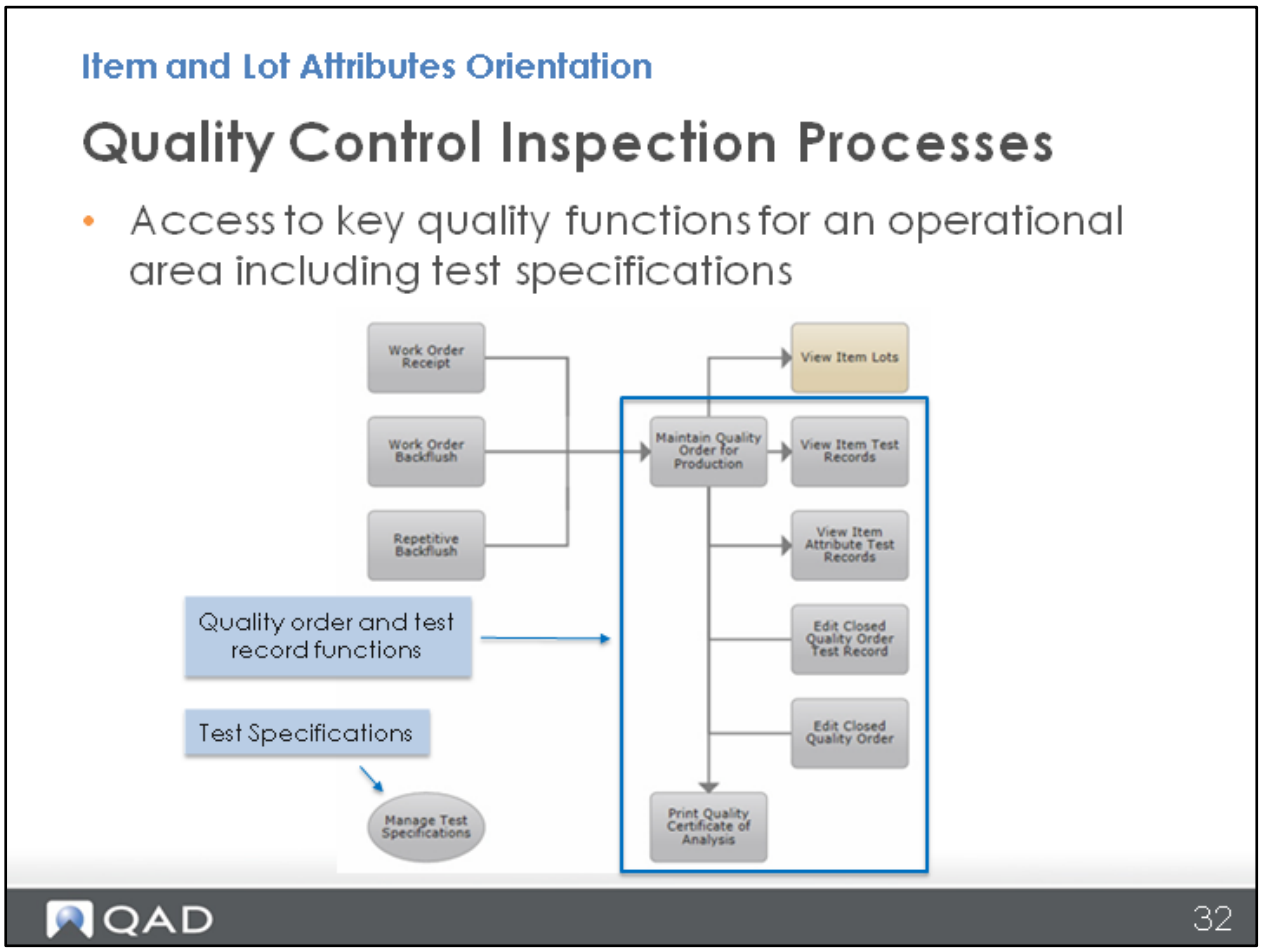
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Inspect Inventory



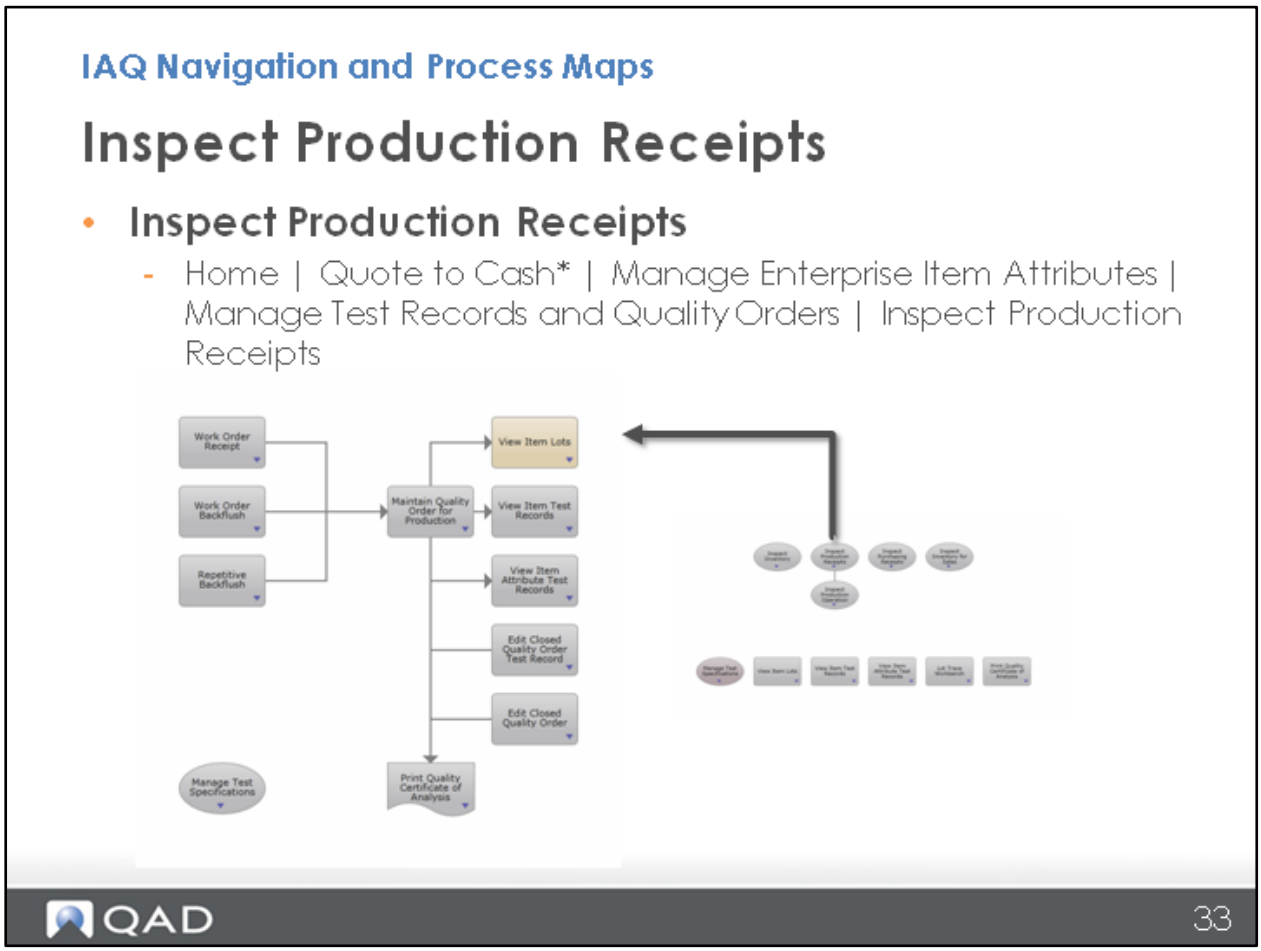
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Quality Control Inspection Processes



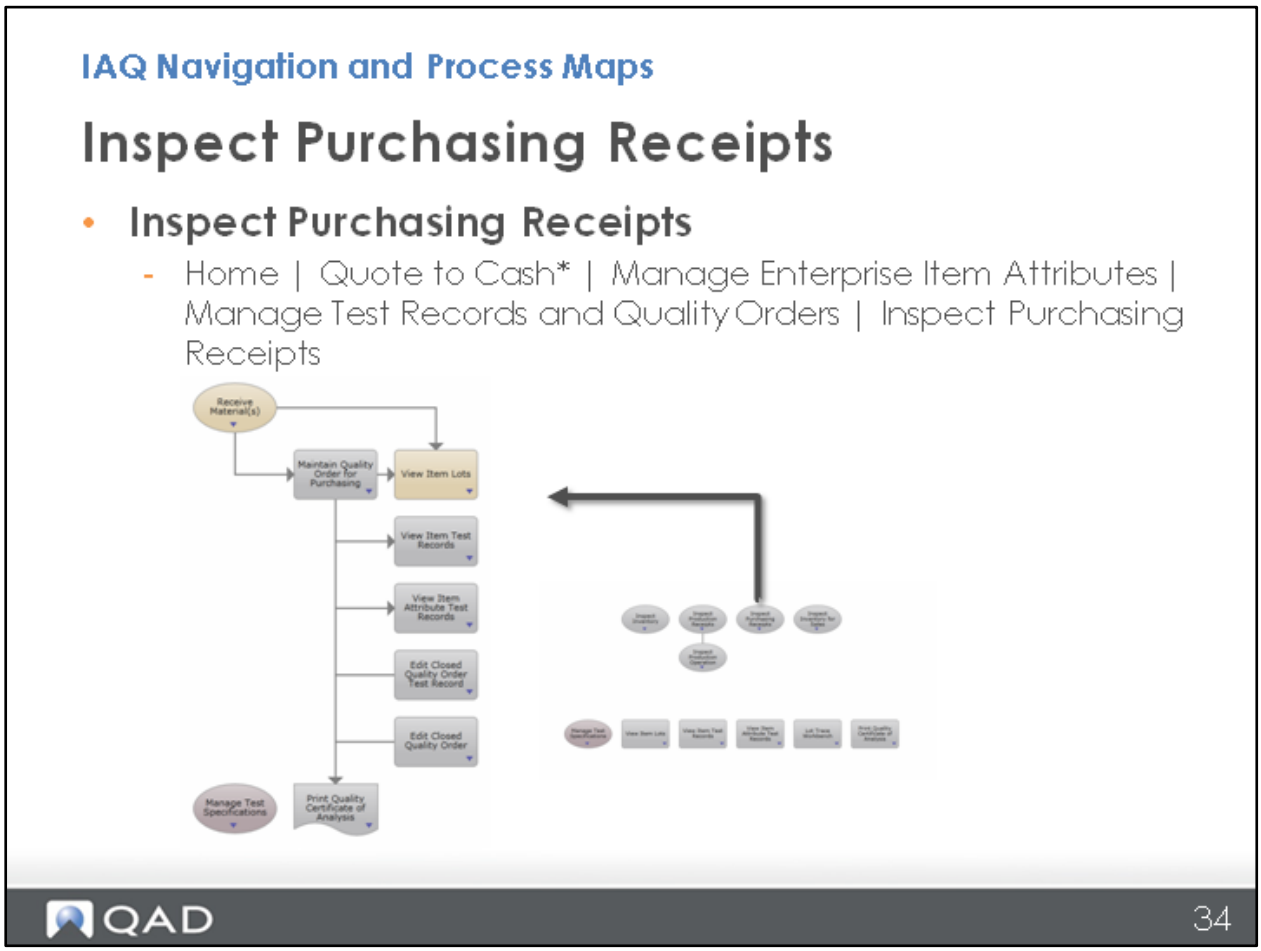
Each of the maps for quality control inspection process provide access to manage test specifications. They also provide access to functions related to test records, quality orders, and certificates of analysis.

Inspect Production Receipts



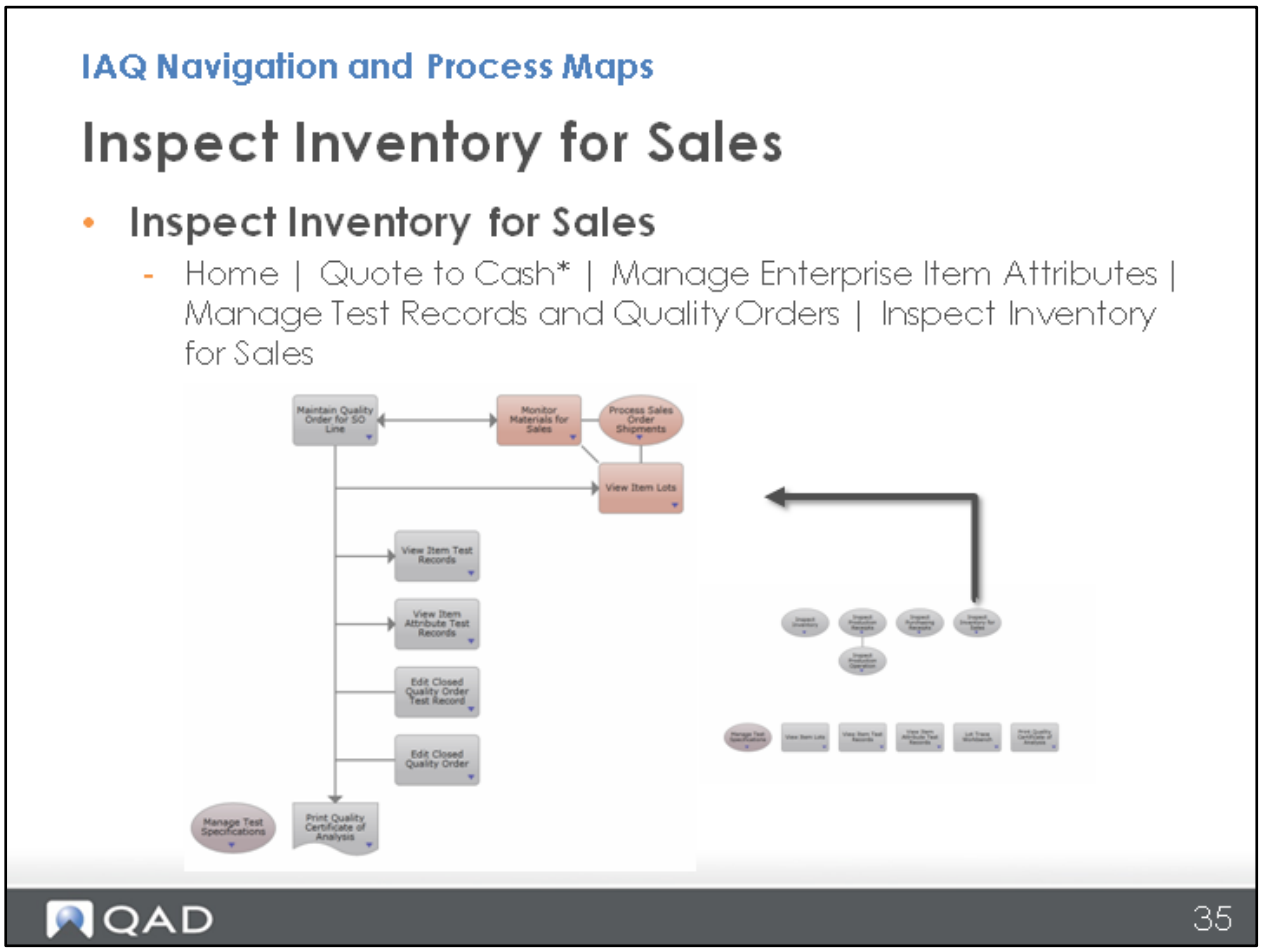
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Inspect Purchasing Receipts



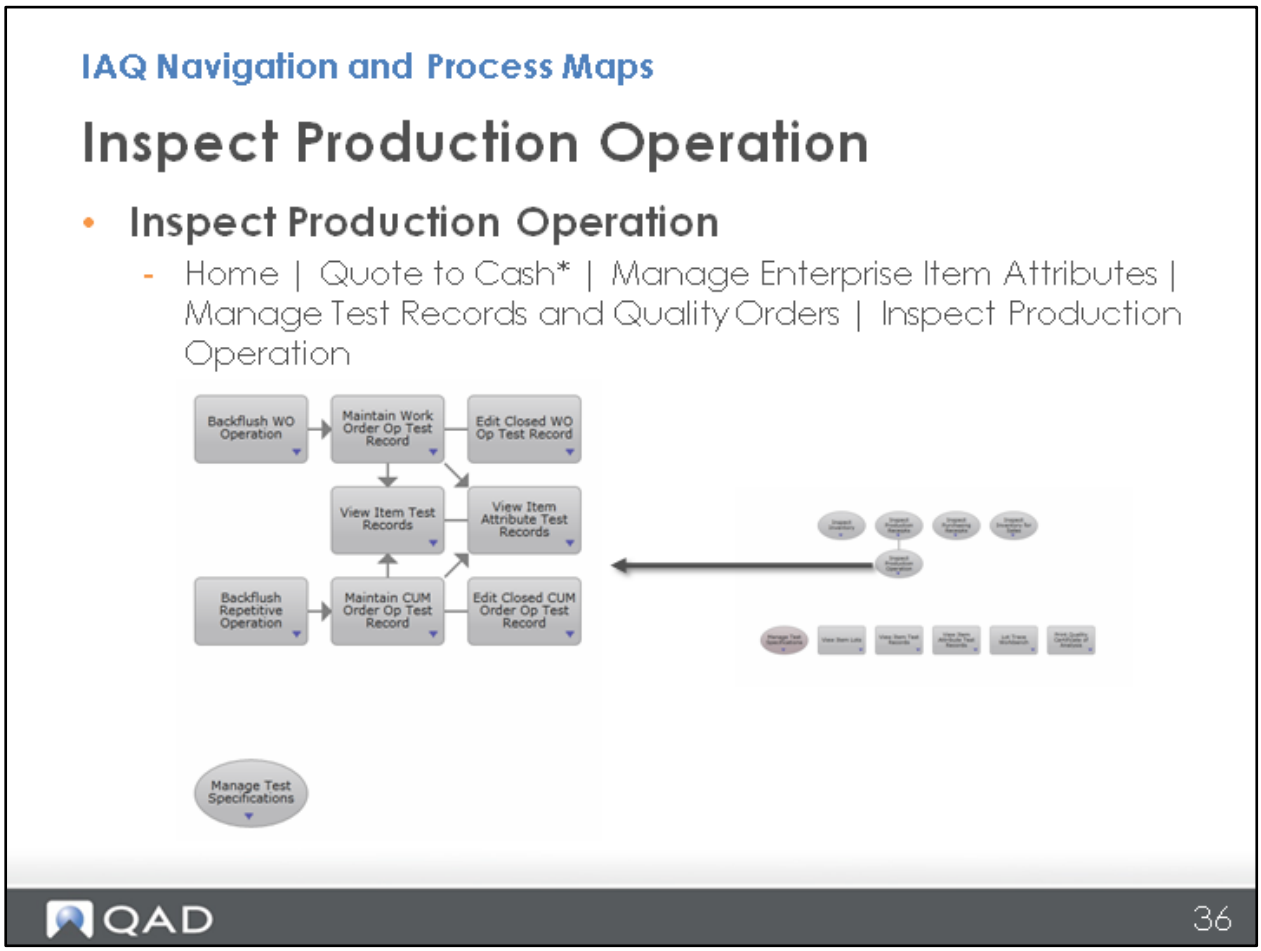
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Inspect Inventory for Sales



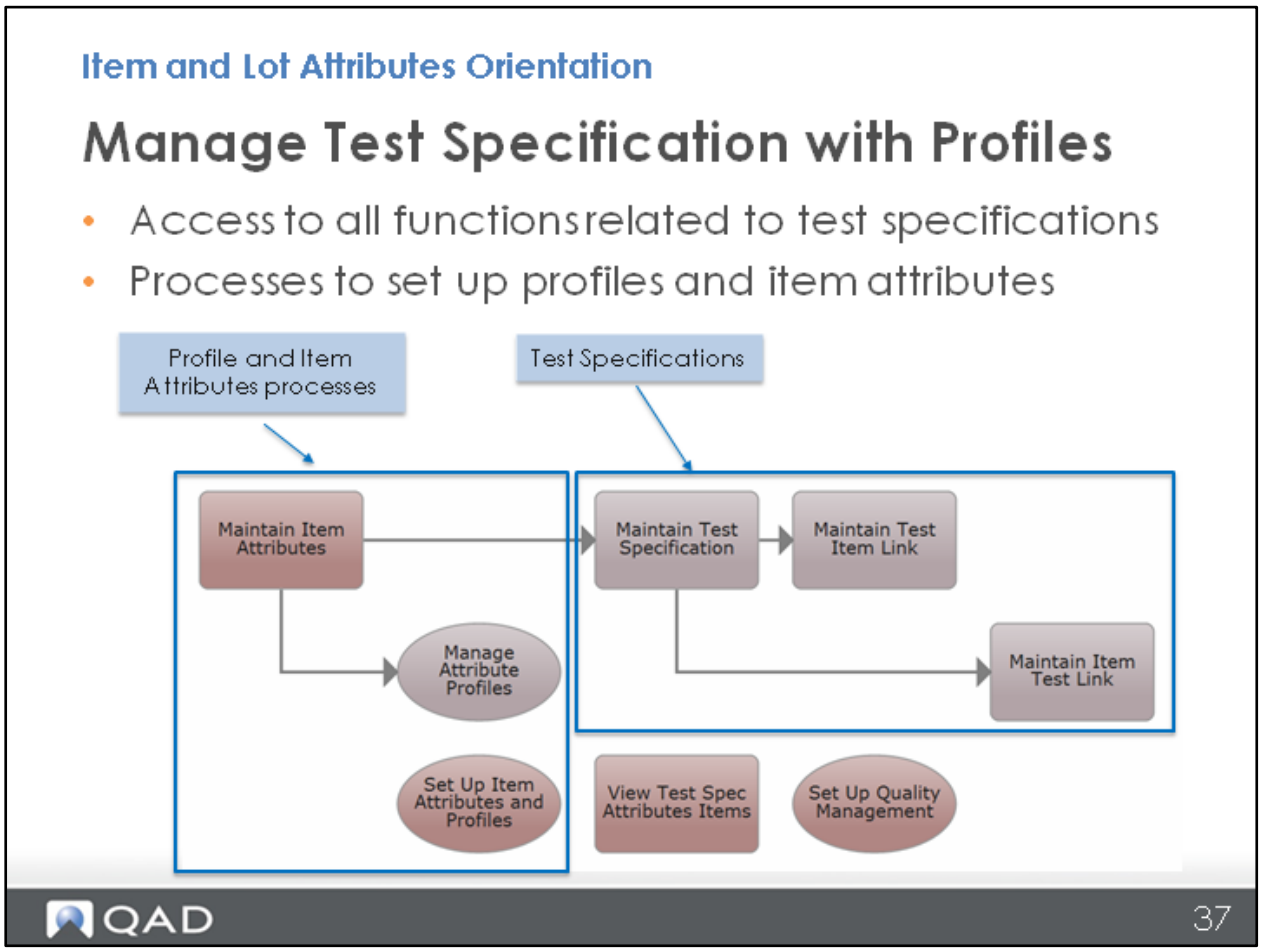
*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Inspect Production Operation

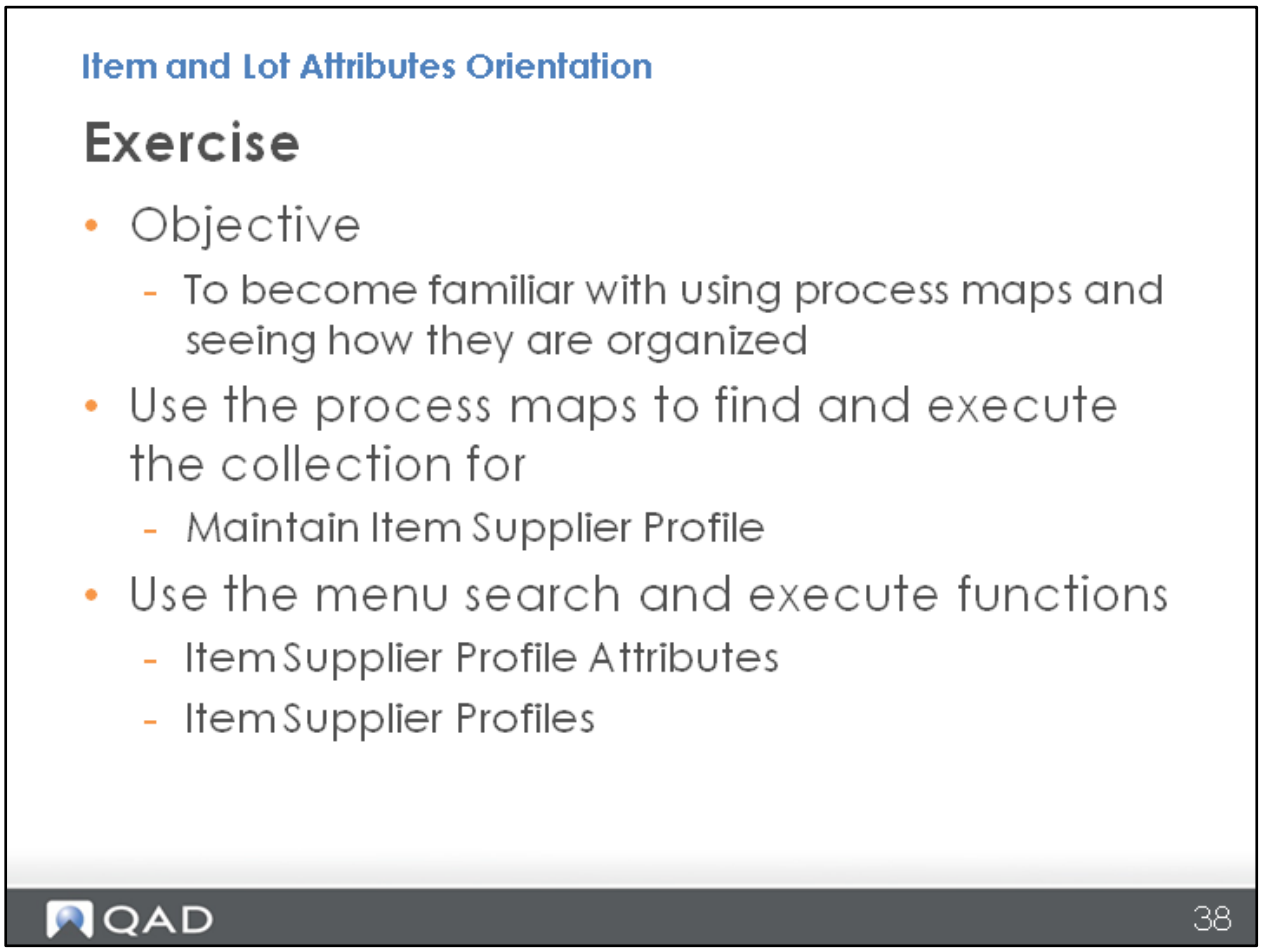


*This path shows how to access the process map from Quote to Cash. You can also access this process map from Procure to Pay or Plan to Perform.

Manage Test Specification with Profiles



Exercise


Item and Lot Attributes Orientation
Exercise
Objective
To become familiar with using process maps and seeing how they are organized
Use the process maps to find and execute the collection for
Maintain Item Supplier Profile
Use the menu search and execute functions
Item Supplier Profile Attributes
Item Supplier Profiles
QAD
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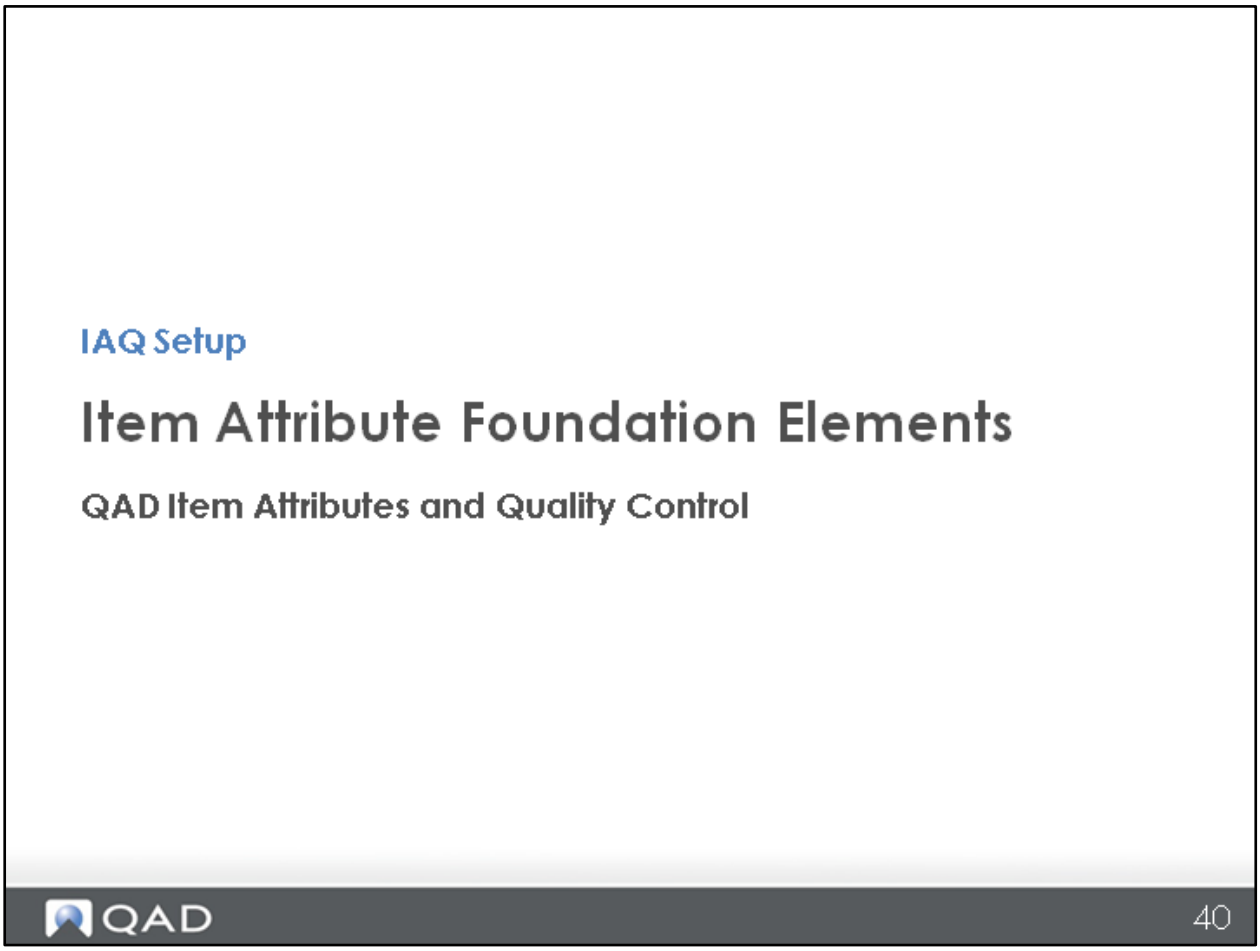
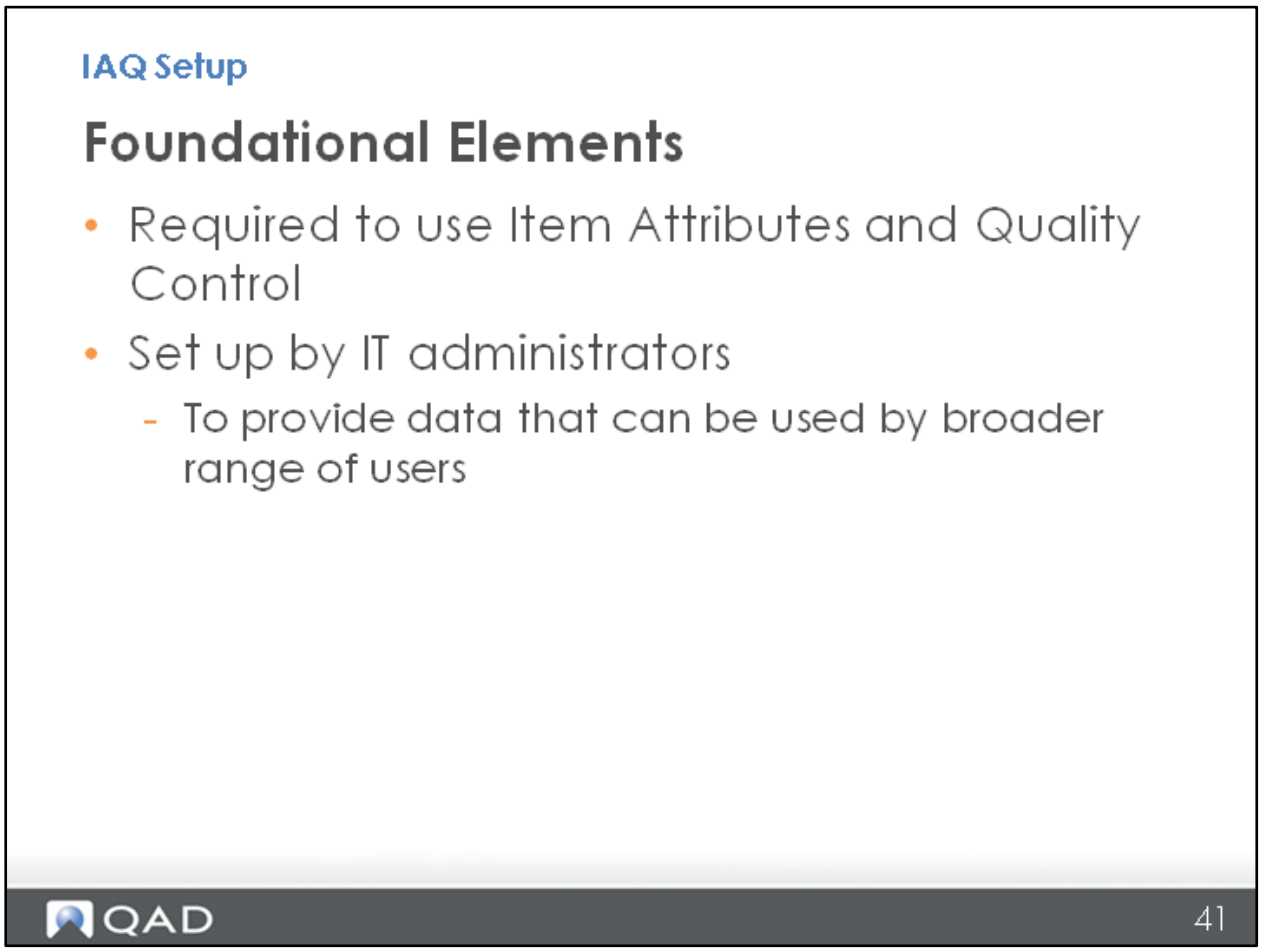
CHAPTER 3

IAQ Setup

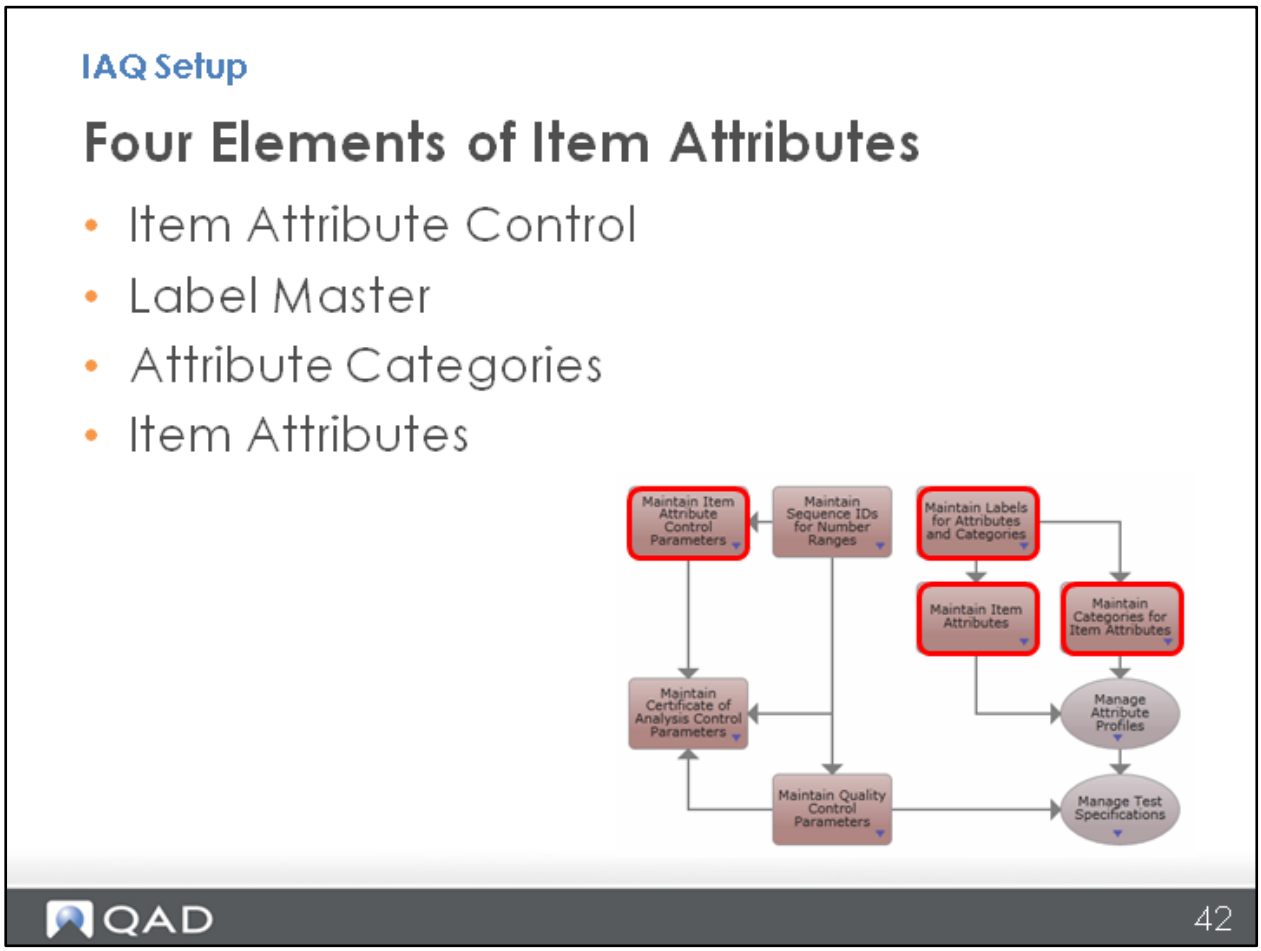
Item Attribute Foundation Elements



Foundational Elements



Four Elements of Item Attributes

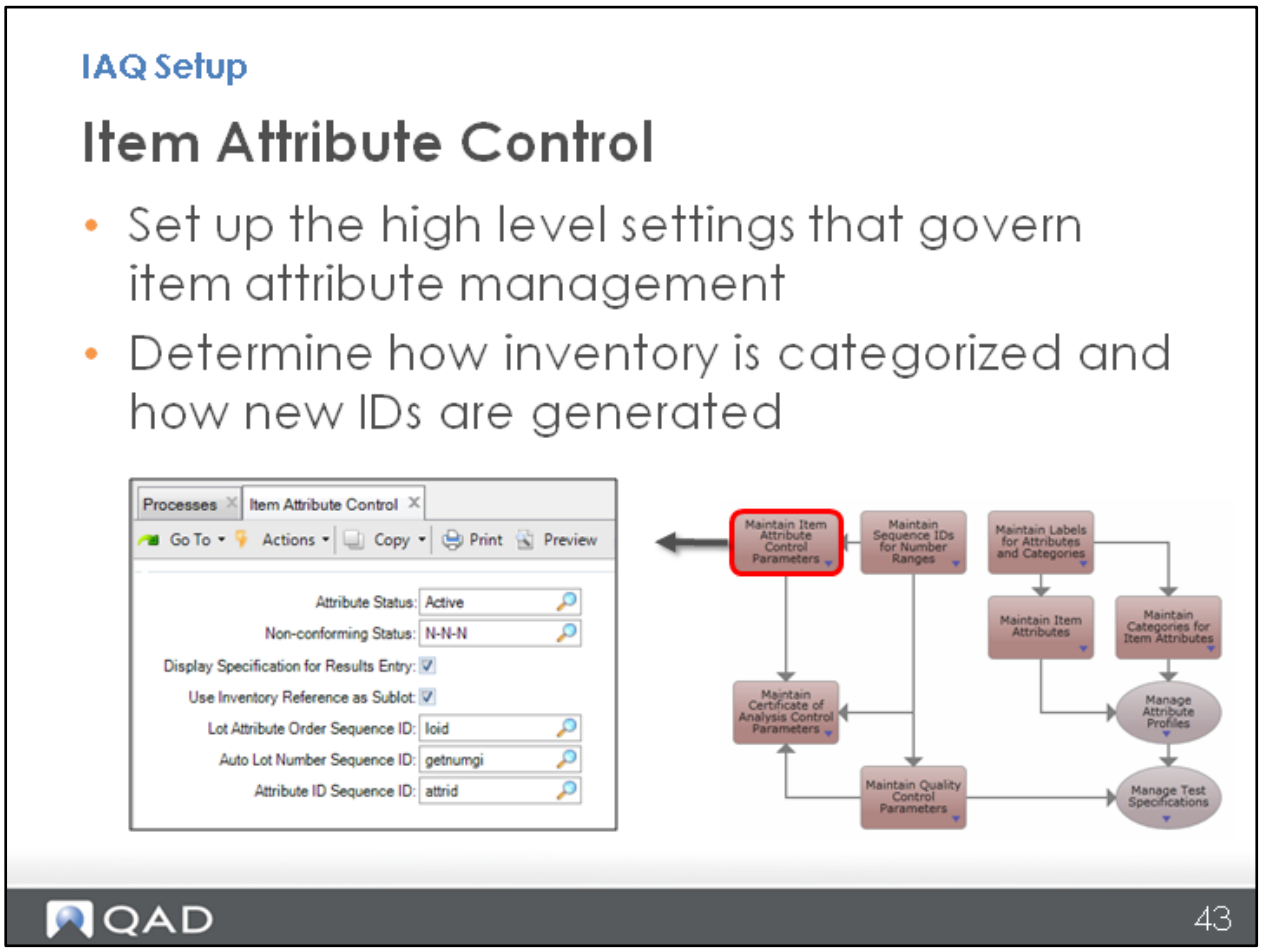


To manage item attributes, you should first understand the core foundational elements:

- Label Master
- Item Attributes
- Attribute Categories
- Item Attribute Control

These core elements are used for business applications for both Item Attributes and Quality Control.

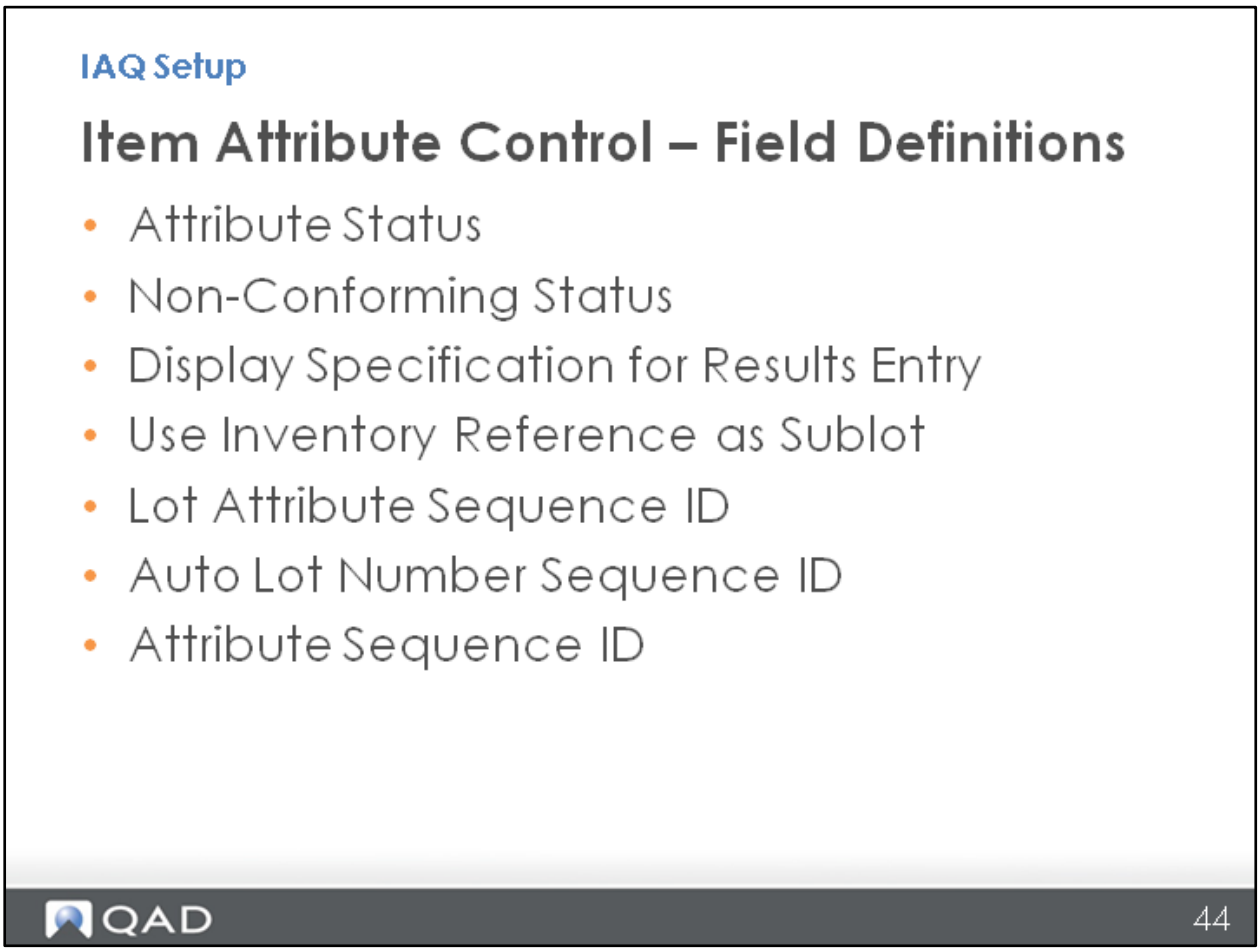
Item Attribute Control



In Item Attribute Control, you can define control parameters that determine the default values for fields associated with item attribute or QAD EE programs. You can:

- Set up the default status for a new attribute when it is added to an attribute profile.
- Set the default inventory status code to be used for processing a non-conforming item lot.
- Determine if the specifications for lot and sublot profile attributes are displayed when using receipt transaction.
- Determine if the inventory detail Reference field identifies a sublot.
- Set the Number Range Management (NRM) sequence code for lot attribute order IDs, automatically assigned lot numbers, and item attribute IDs.

Item Attribute Control – Field Definitions



Item Attribute Control

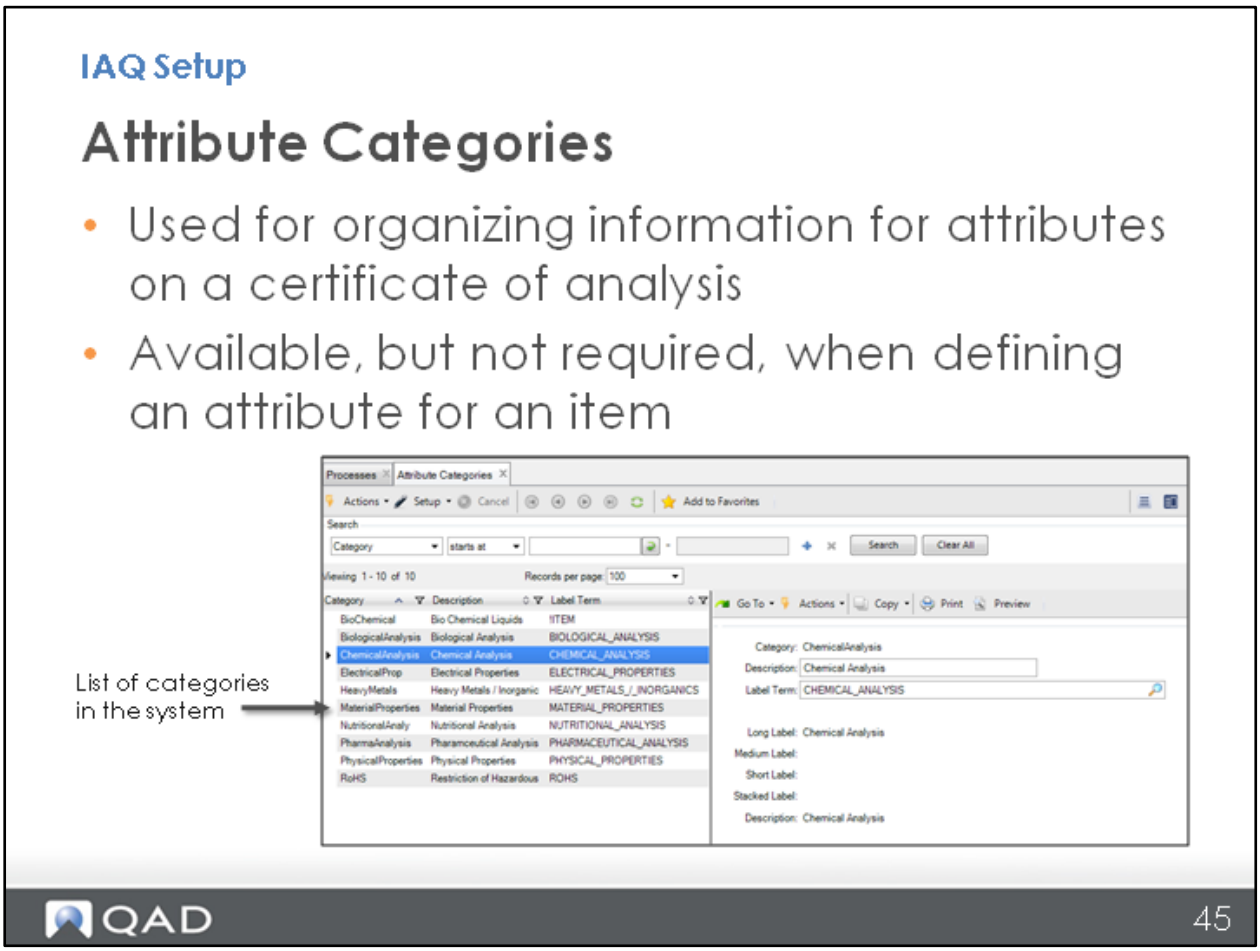
- **Attribute Status.** Set the default status to Active or Inactive. It is recommended that you set the default status to Active, which is the default status for a new attribute when it is added to an attribute profile. For more information about attribute status, see “Adding Attributes to an Item Profile” on page 23.
- **Non-conforming Status.** Select the inventory status code that is applied to an inventory lot when the result for that lot on a quality or lot attribute order is non-conforming. The inventory status code is applied when you close the quality or lot attribute order for that inventory lot. For more information about inventory status codes, see the QAD Master Data User Guide.
- **Display Specification for Results Entry.** Select this check box to have the system display the profile specifications for lot and sublot attributes when entering values for those attributes using supported receipt transactions.

- **Use Inventory Reference as Sublot.** Select this check box to have the inventory detail Reference field identify the sublot for an inventory lot record. This check box should only be selected if:
  - The Reference field for inventory records will never be used to identify a location such as a shelf, a bin, a pallet, or a container.

    and,
  - There is no integration with QAD Warehousing.

  Note: If you are using QAD Warehousing, do not select this check box because Warehousing uses the Reference field for pallets.
- **Lot Attribute Order Sequence ID.** Enter the Number Range Management (NRM) sequence used to automatically assign the ID for lot attribute orders. The system uses this code to generate sequence numbers for all lot attribute order numbers. When setting up the sequence in NRM, use ql_id as the target dataset. For information on setting up NRM sequences, see the QAD System Administration User Guide.
- **Auto Lot Number Sequence ID.** Enter the NRM sequence code used to automatically assign lot numbers for inventory. The system uses this sequence ID when there is no auto lot number specified in the item master. When setting up the sequence in NRM, use attrlot_lot as the target dataset. For information on setting up NRM sequences, QAD System Administration User Guide.
- **Attribute ID Sequence ID.** Enter the NRM sequence code used to automatically assign the attribute ID for an item attribute. When setting up the sequence in NRM, use attr_name as the target dataset. For information on setting up NRM sequences, see the QAD System Administration User Guide.

Attribute Categories

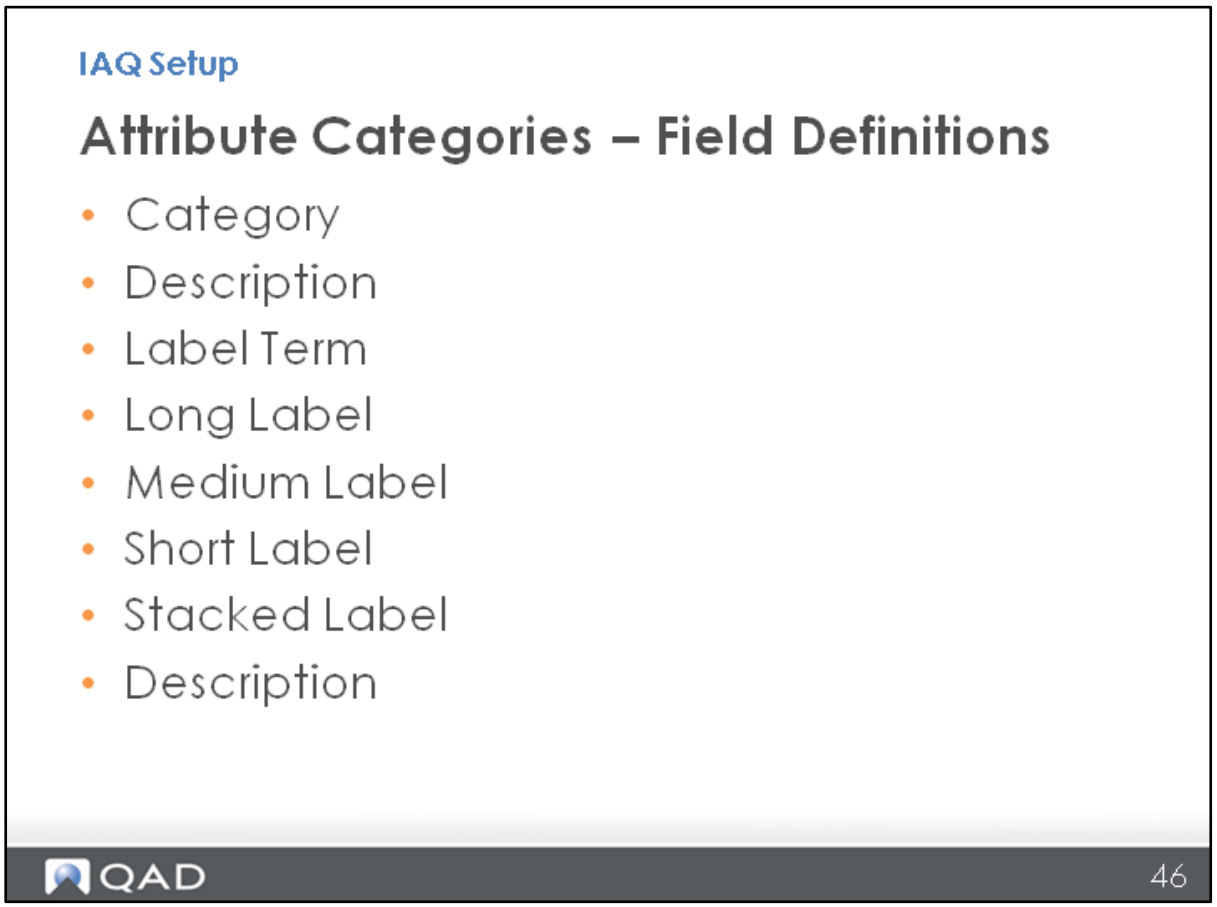


Use the Attribute Categories function to browse, create, and maintain attribute categories that you can use with item attributes. For certificate of analysis functions, the system uses attribute categories to organize and label groups of attributes.

You can identify ways that attributes are classified for items, then create attribute categories for each classification. In some cases, an attribute can belong to multiple attribute categories. For example, you can create attribute categories for:

- Classes and sub-classes of attributes that need to be verified or measured when items are received or produced.
- Item attributes that have values that you need to maintain, store, and report for inventory quantities and/or item lots.
- Item attributes that have specifications that you need to communicate to suppliers or customers.
- Item attributes that have specifications and typical or actual values that you need to communicate to suppliers or customers.

Attribute Categories – Field Definitions



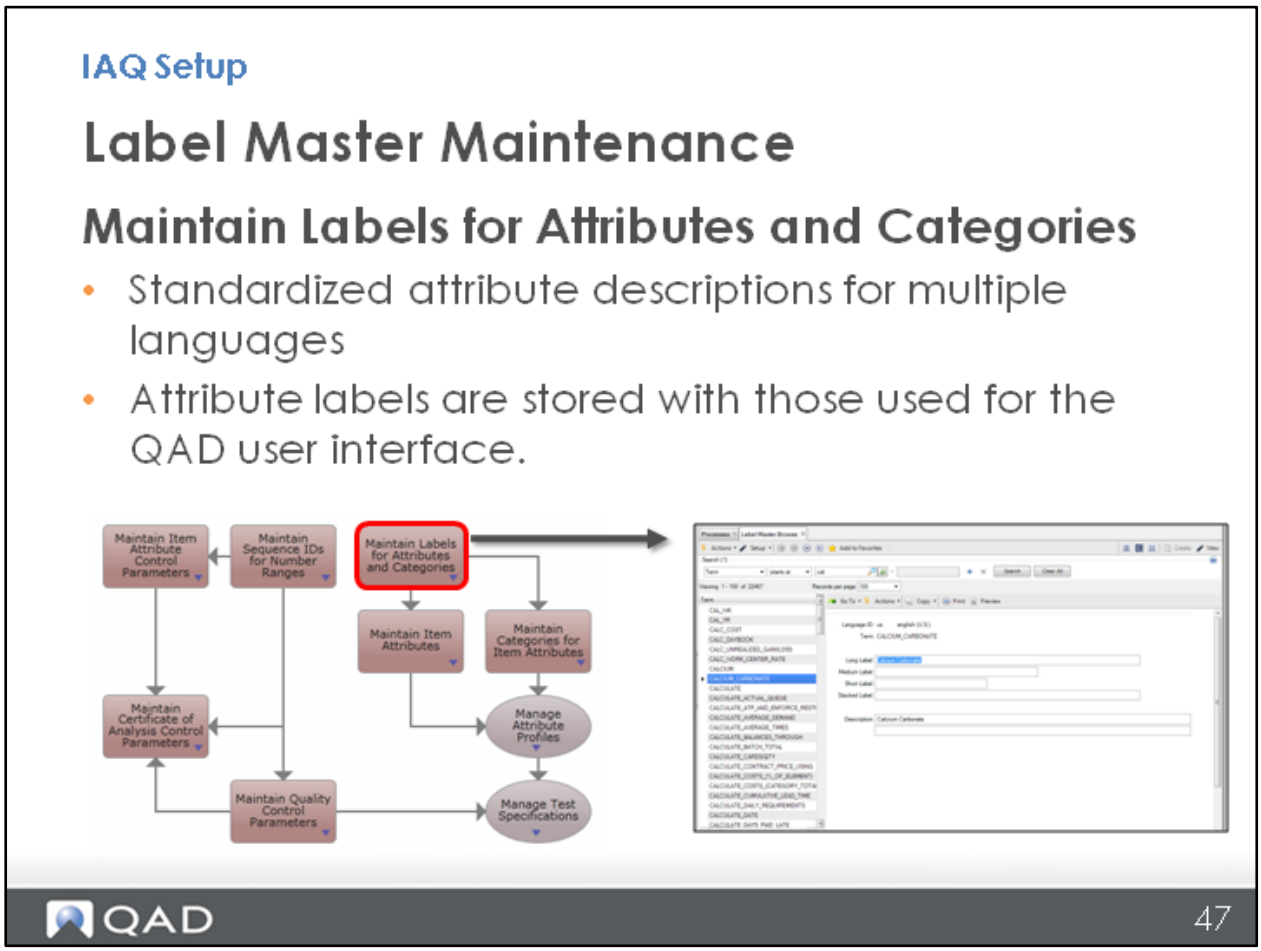
Attribute Categories

- **Category.** Enter a unique identifier for the attribute category.

  Note: Attributes can be classified in different ways and optionally have one or more attribute categories to classify them.
- **Description.** Enter a short description of the attribute category.
- **Label.** Select a valid label term defined in Label Master Maintenance. The system uses this term and the defined attribute to determine the label that displays on the user interface.

  Note: If the value for Label Term is left blank or if a label master record does not exist for the label term, the attribute functions display the attribute description in place of a label.
- **Long Label.** Displays the Label Term's primary display label from the label master record.
- **Medium Label.** Displays the Label Term's medium display label from the label master record. The medium label is only displayed if the long label is too long to display on the screen.
- **Short Label.** Displays the Label Term's short display label from the label master record. The short label is only displayed if the long and medium labels are too long to display on the screen.
- **Stacked Label.** Displays the Label Term's stacked display label from the label master record.
- **Description.** Displays the Label Term's description from the label master record.

Label Master Maintenance



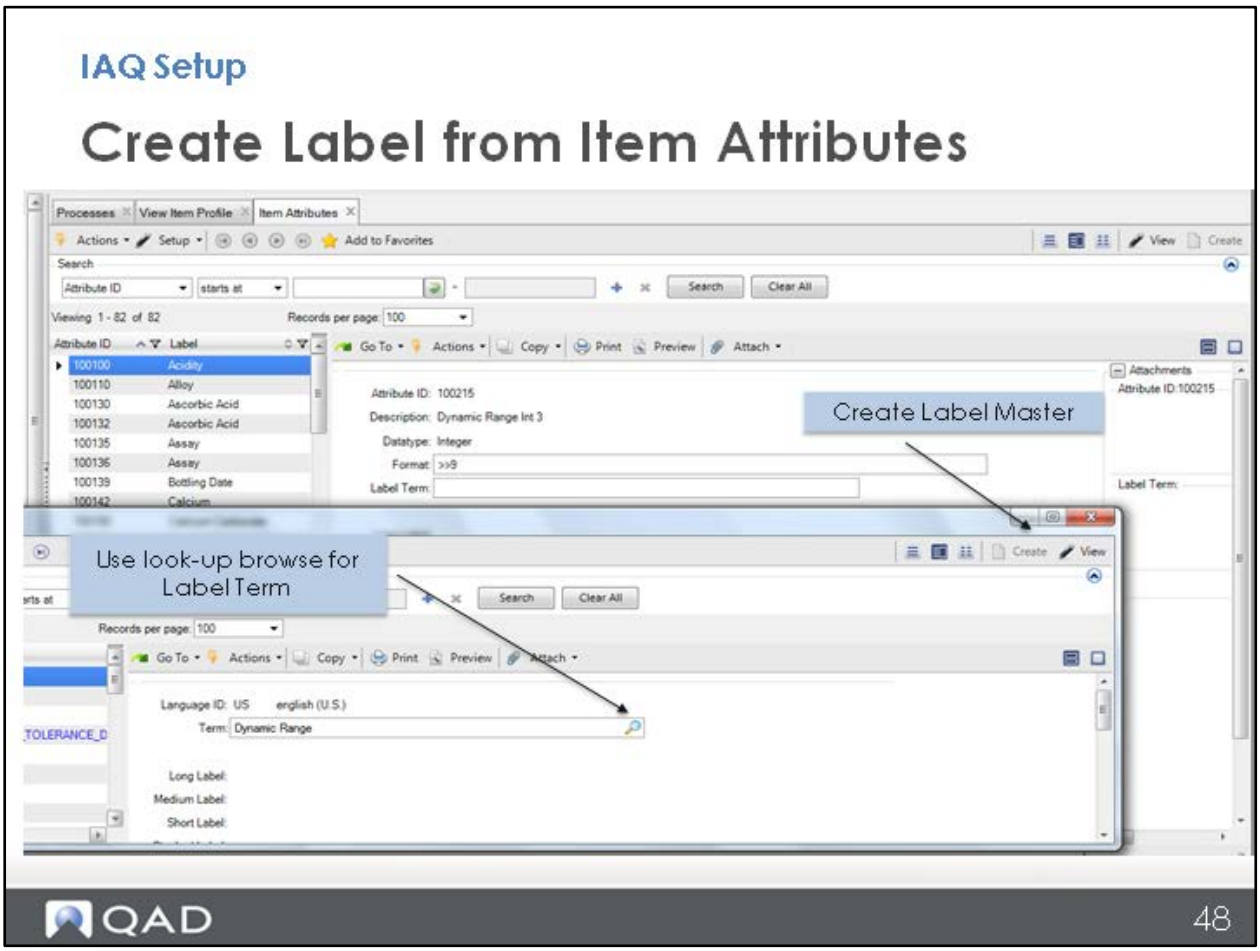
Labels determine how attributes appear on reports and within the system and they allow multiple attributes to measure the same characteristic using different datatypes. This enables you to create variants of an attribute that are distinct within the system.

QAD EE uses label master records to provide support for multiple languages for all applications, including IAQ. In IAQ, label master records help standardize the attribute descriptions for multiple languages. For more information about creating labels, see the QAD System Administration User Guide.

Use the Label Master Maintenance within the Label Master Browse to create and modify labels for a language. Each label has a Term, which is the unique identifier for that label, and a collection of labels which may or may not be unique.

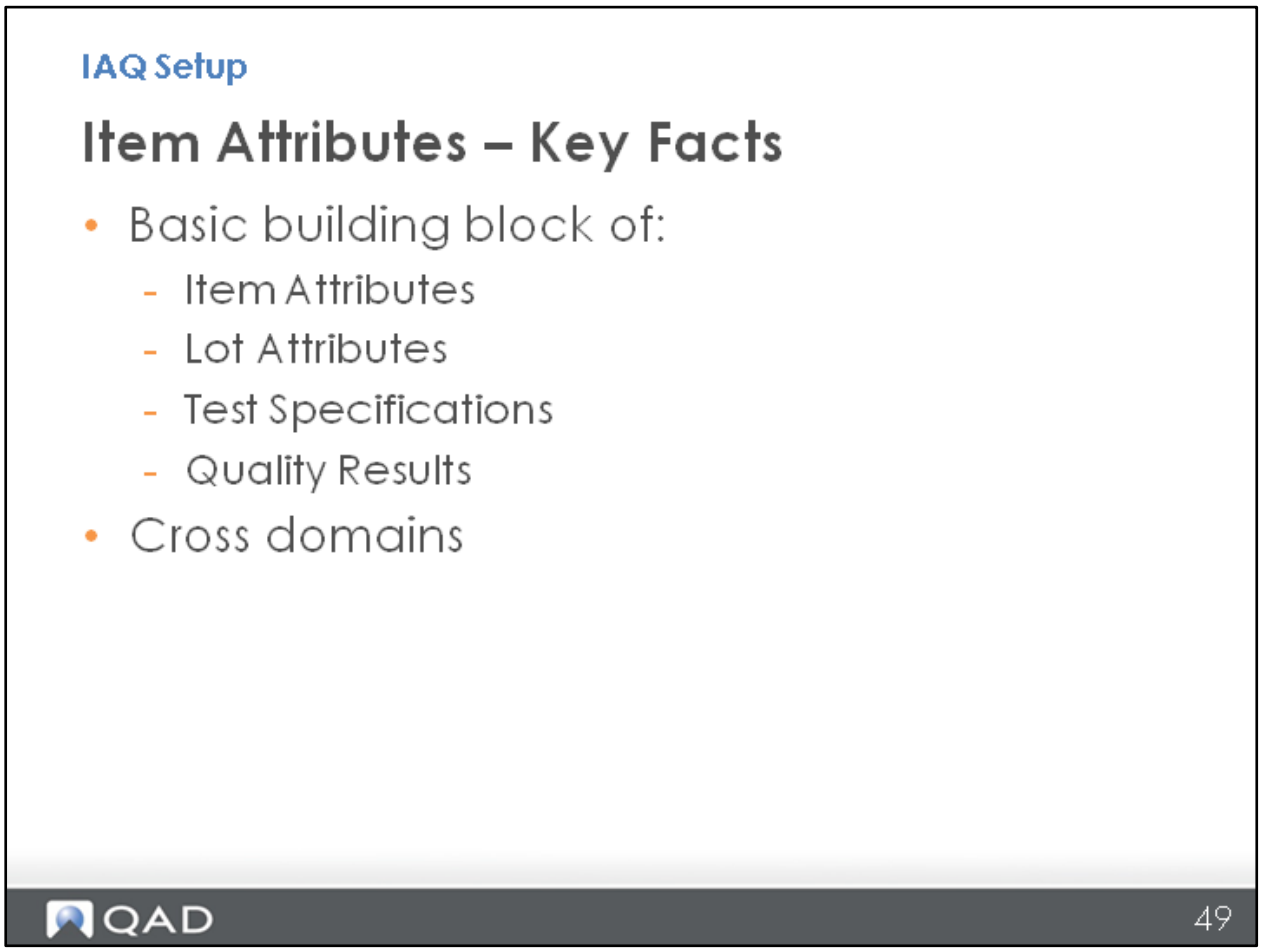
Note: Best practice is to create labels before creating attributes. Label master records are system-level data that should be secured and accessed by Information Technology personnel.

Create Label from Item Attributes



To simplify the label creation process, a new label master record can be created by searching on Label Term and using the create button on the Label Master Browse. This will launch the maintenance program.

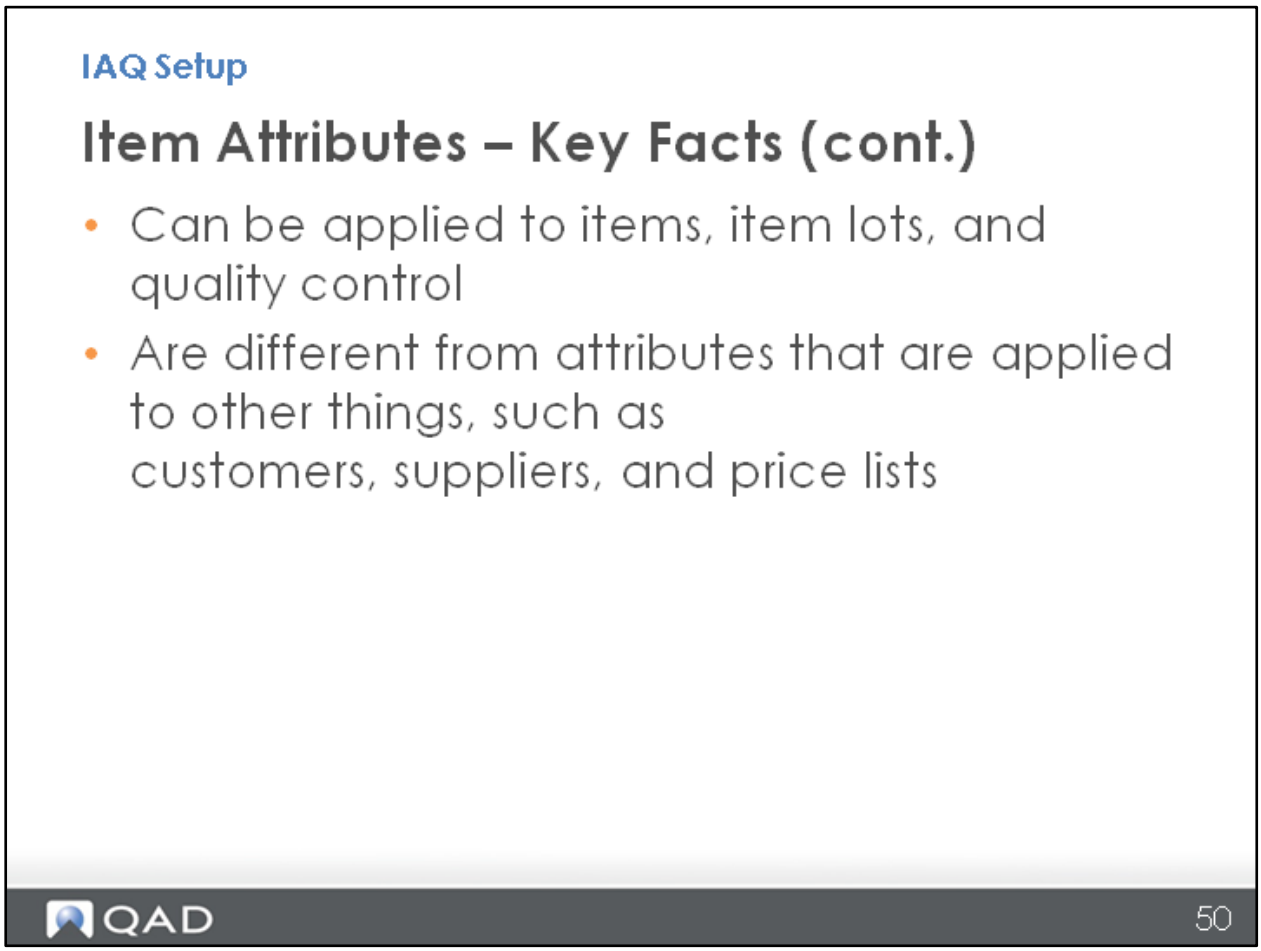
Item Attributes – Key Facts



Item attributes are specific characteristics that can be applied to items. Attributes serve as the basic building blocks necessary to support item attributes, lot attributes, quality control specifications, and quality control results. Attributes, which are used for items and quality control, can be applied across all domains.

An item attribute consists of an identifier, description, label identifier, and additional data for a characteristic that can be applied to an item. Each attribute has a unique identifier and an optional label identifier that supports the capability for an attribute to have labels that are appropriate for a user's language. Like labels, once item attributes are defined in one domain, they are shared and available across all domains.

Item Attributes – Key Facts (cont.)

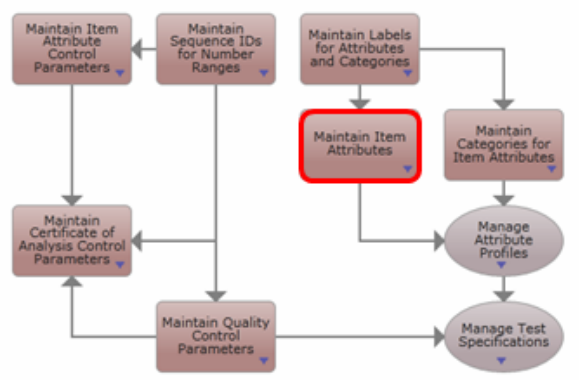


Creating an Item Attribute

IAQ Setup

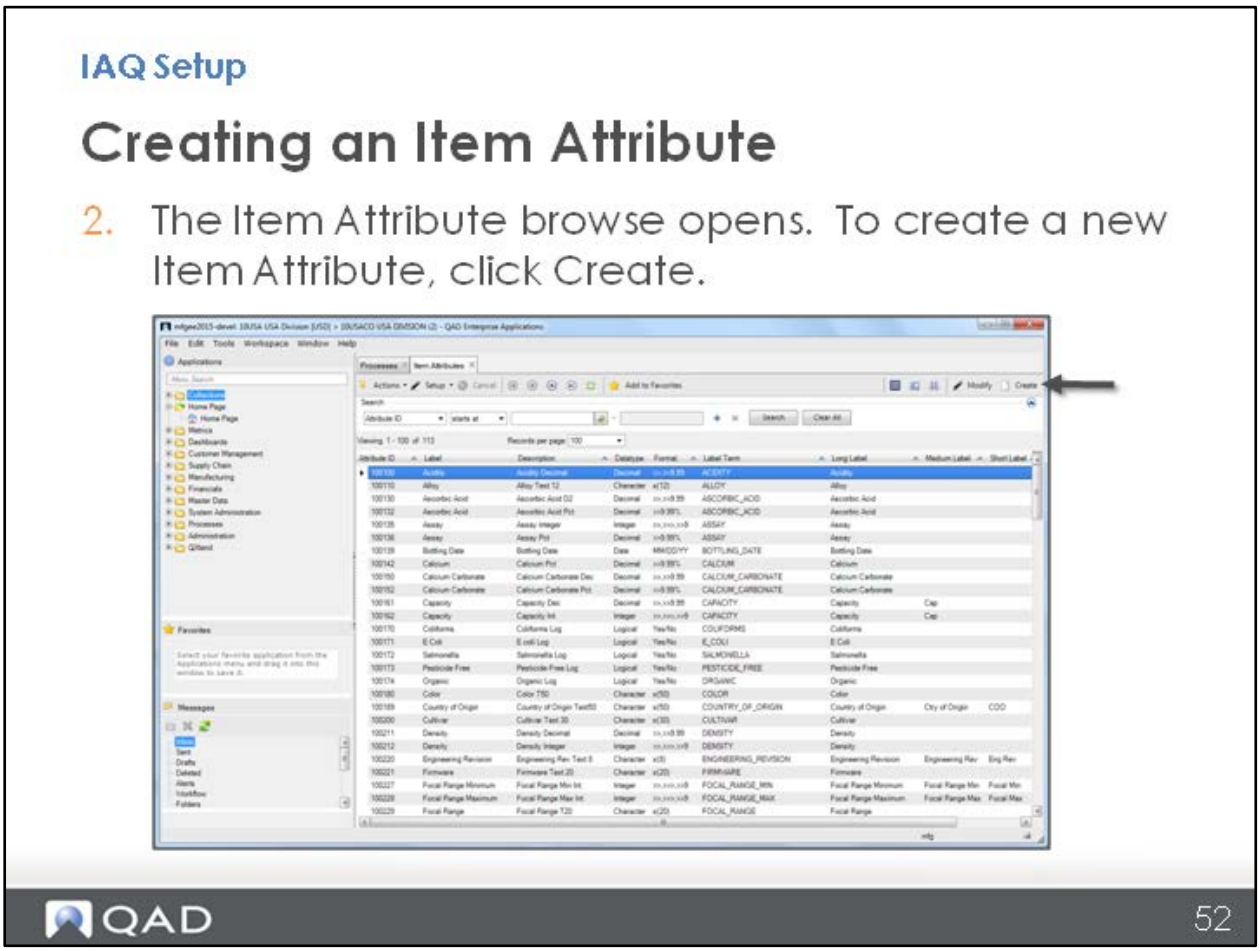
Creating an Item Attribute

1. Open Item Attributes by selecting Maintain Item Attributes from the Manage Enterprise Item Attributes process map.



QAD 51

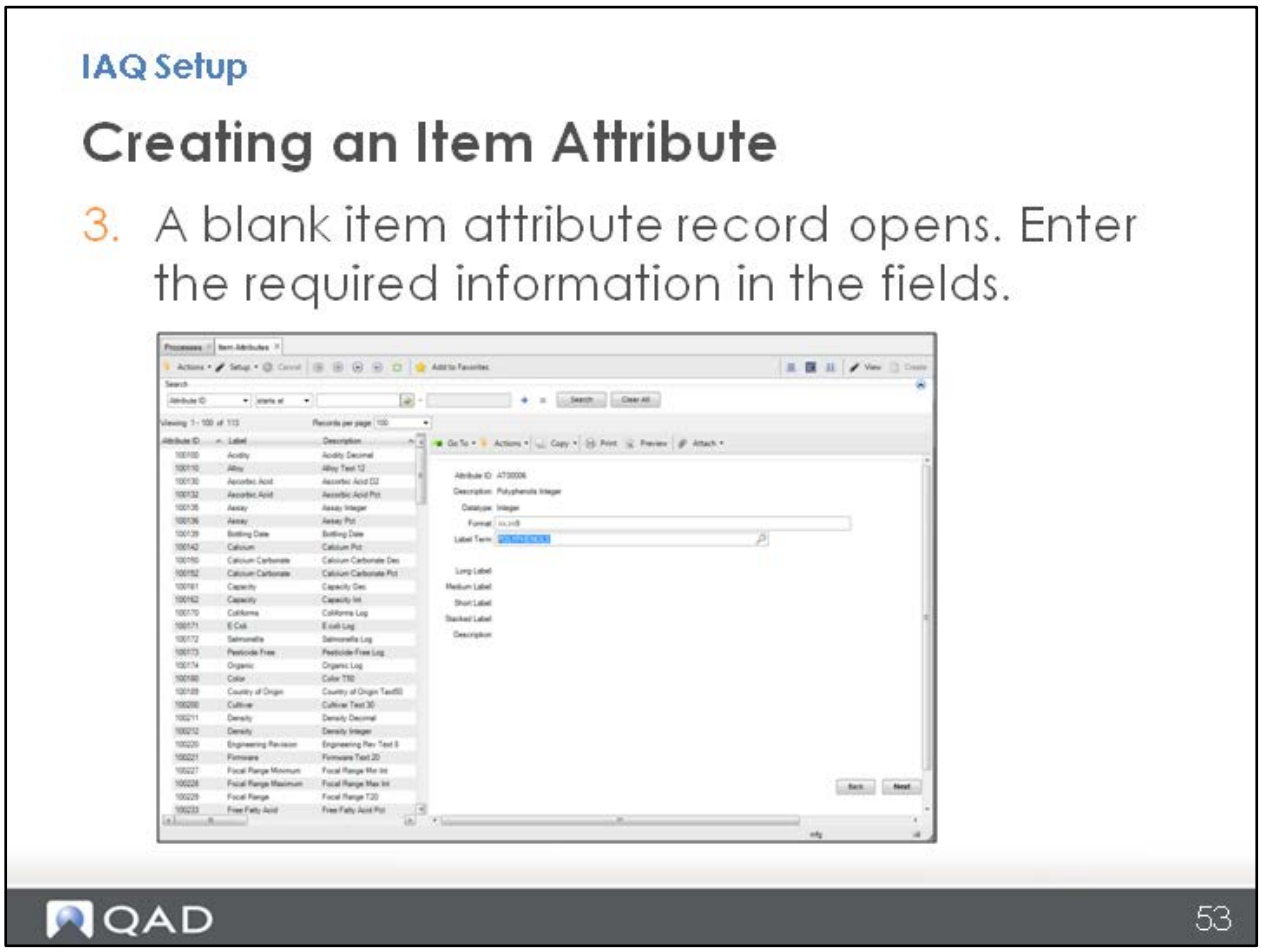
Creating an Item Attribute



The Item Attribute browse displays a list of item attributes that can be assigned to items. To create an item attribute, click Create.

Note: You can also use the Setup Item Attribute browse collection to create item attributes. Item Attributes, like label master records, are not limited to a single domain; they are available across domains.

Creating an Item Attribute



Item Attribute – Field Definitions:

- **Attribute ID.** Leave this field blank and click Next; the system automatically inserts an ID in this field. Otherwise, enter a unique alphanumeric ID of up to 32 characters for the attribute.

  Note: For information about setting up the automatic assignment of attribute ID numbers, see “Item Attribute Control” on page 8.

- **Description.** Enter a short description to identify the attribute. When entering a description, the best practice is to indicate the name of the attribute and information about its datatype and format. This information is particularly useful when multiple attributes share the same label, but have different combinations of datatype and format. For example, if there are two attributes for capacity with integer and decimal datatypes, you can enter Capacity Int and Capacity Dec for the descriptions.

- **Datatype.** Use the lookup and select the datatype (character, decimal, integer, date, or logical) associated with the attribute. If you select the date or logical datatype, the system automatically enters the datatype format in the Format field.

  Note: Once an attribute is referenced by an attribute profile or test specification, you cannot modify the value for Datatype.

- **Format.** Define the format for the datatype that was selected using standard programming and database conventions.
  - **Character.** For a character datatype, enter the value in the form x(n), where n is the maximum number of characters that can be entered in this field. The value for n cannot be greater than 50.
  - **Decimal.** For a decimal datatype, enter the following formats depending on the desired value range:

Format	Value Range
>.99	0.00 - 9.99
>,>>9.99	0.00 - 9,999.99
>>>.9999%	0.00 - 999.9999%

  - **Integer.** For an integer datatype, the following table contains examples of formats that can be entered depending on the desired value range:

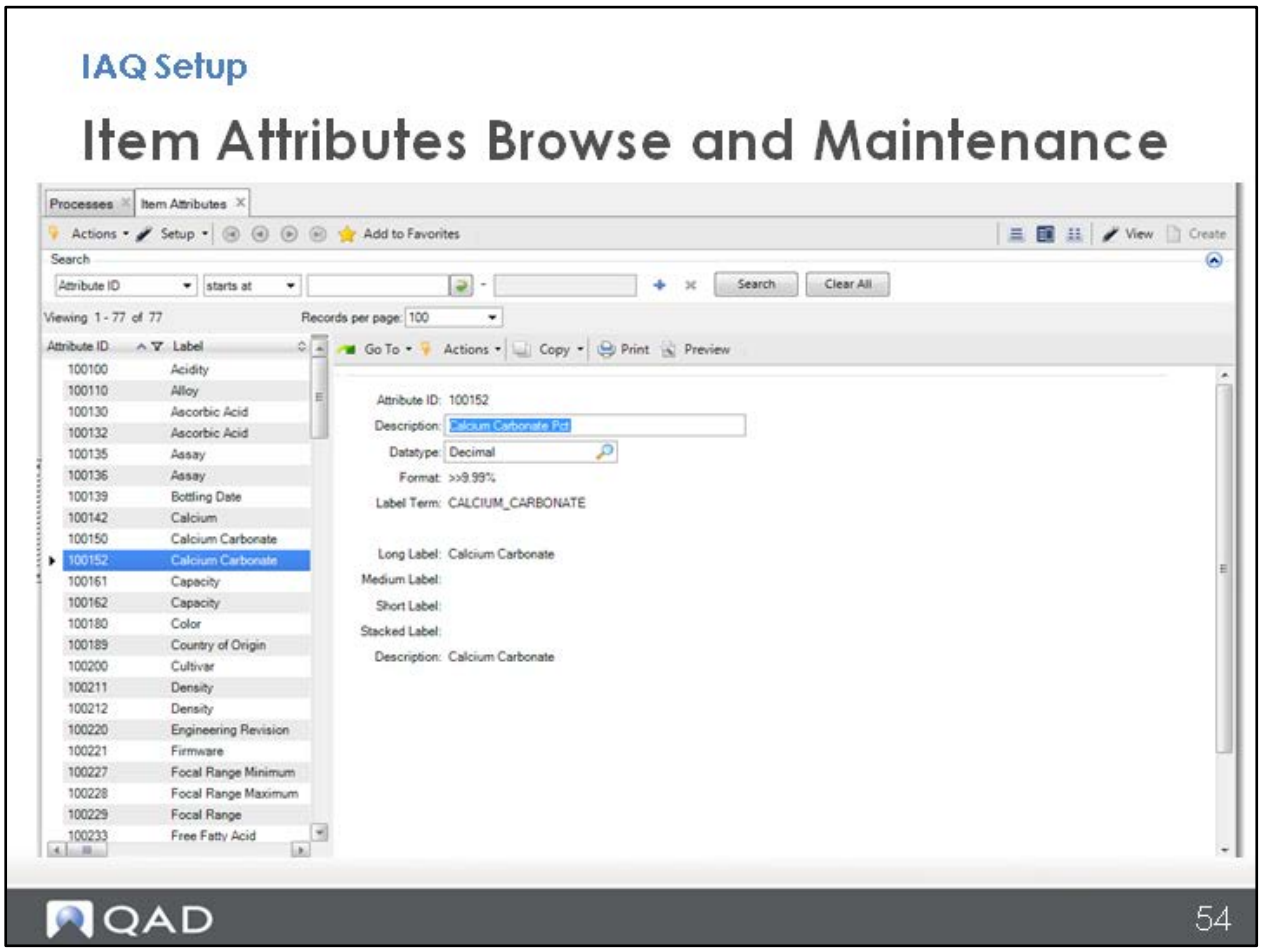
Format	Value Range
>9	0 - 99
>,>>9	0 - 9,999
>9%	0 - 99%

  - **Date.** For a date datatype, the format is system-defined as MM/DD/YY.
  - **Logical.** For a logical datatype, the format is system-defined as Yes/No.

  Note: If this item attribute is referenced by an attribute profile, you can modify the format for an item attribute. However, existing transaction history records are not updated. The system applies the updated format definition to records created after the change.
- **Label Term.** Select a valid label term defined in Label Master Maintenance. The system uses this term and the defined attribute to determine the label that displays on the user interface. For more information about creating labels, see QAD System Administration User Guide.

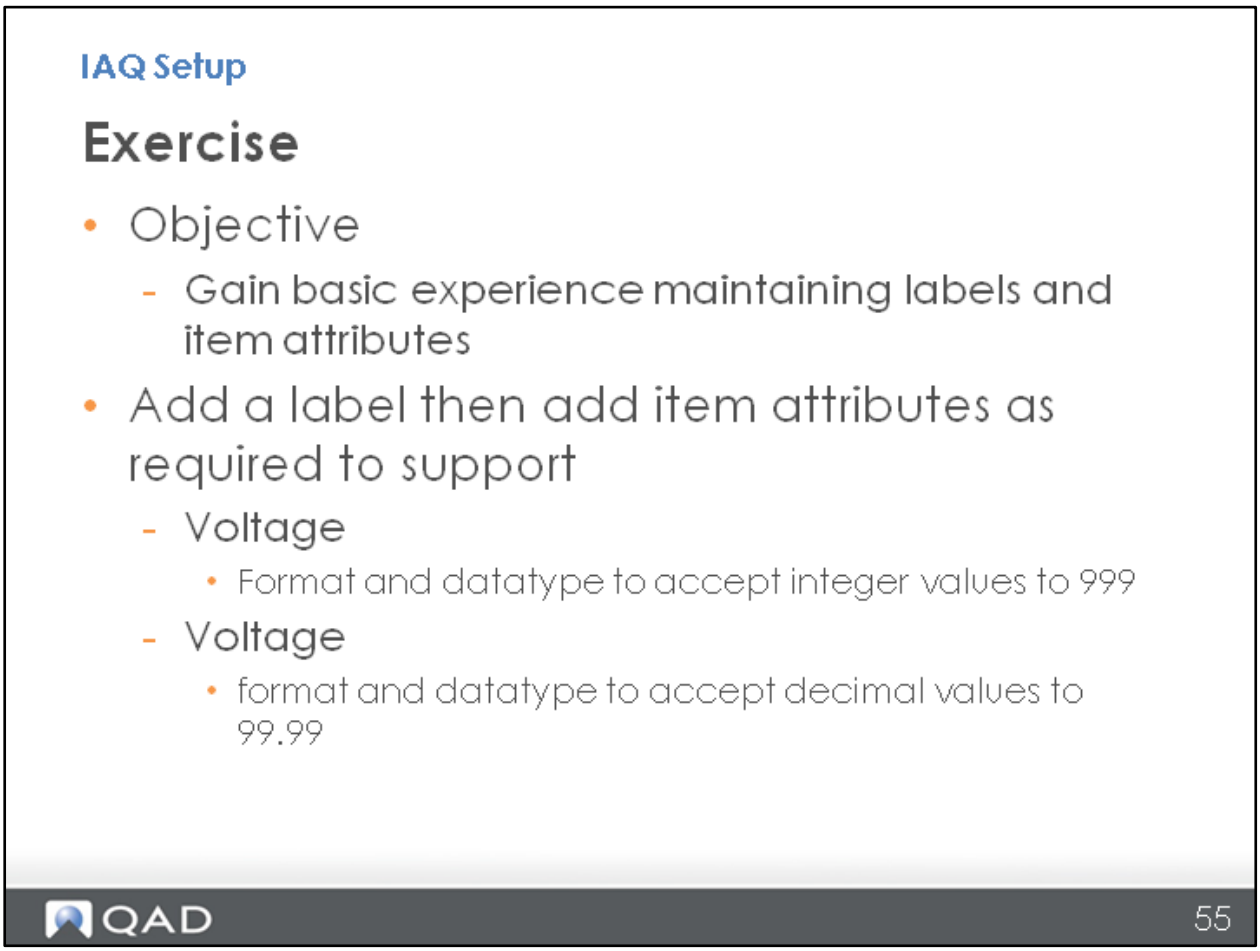
  Note: If the value for Label Term is left blank or if a label master record does not exist for the label term, most attribute functions display the attribute description in place of a label.
- **Long Label.** Displays the Label Term's primary display label from the label master record.
- **Medium Label.** Displays the Label Term's medium display label from the label master record. The medium label is only displayed if the long label is too long to display on the screen.
- **Short Label.** Displays the Label Term's short display label from the label master record. The short label is only displayed if the long and medium labels are too long to display on the screen.
- **Stacked Label.** Displays the Label Term's stacked display label from the label master record.
- **Description.** Displays the Label Term's description from the label master record.
- **Input Value.** Enter a valid value for this attribute to verify that you have correctly set up the datatype and format for the attribute.
- **Display With Format.** Displays how the attribute appears in the user interface with its datatype and format for the input value.

Item Attributes Browse and Maintenance

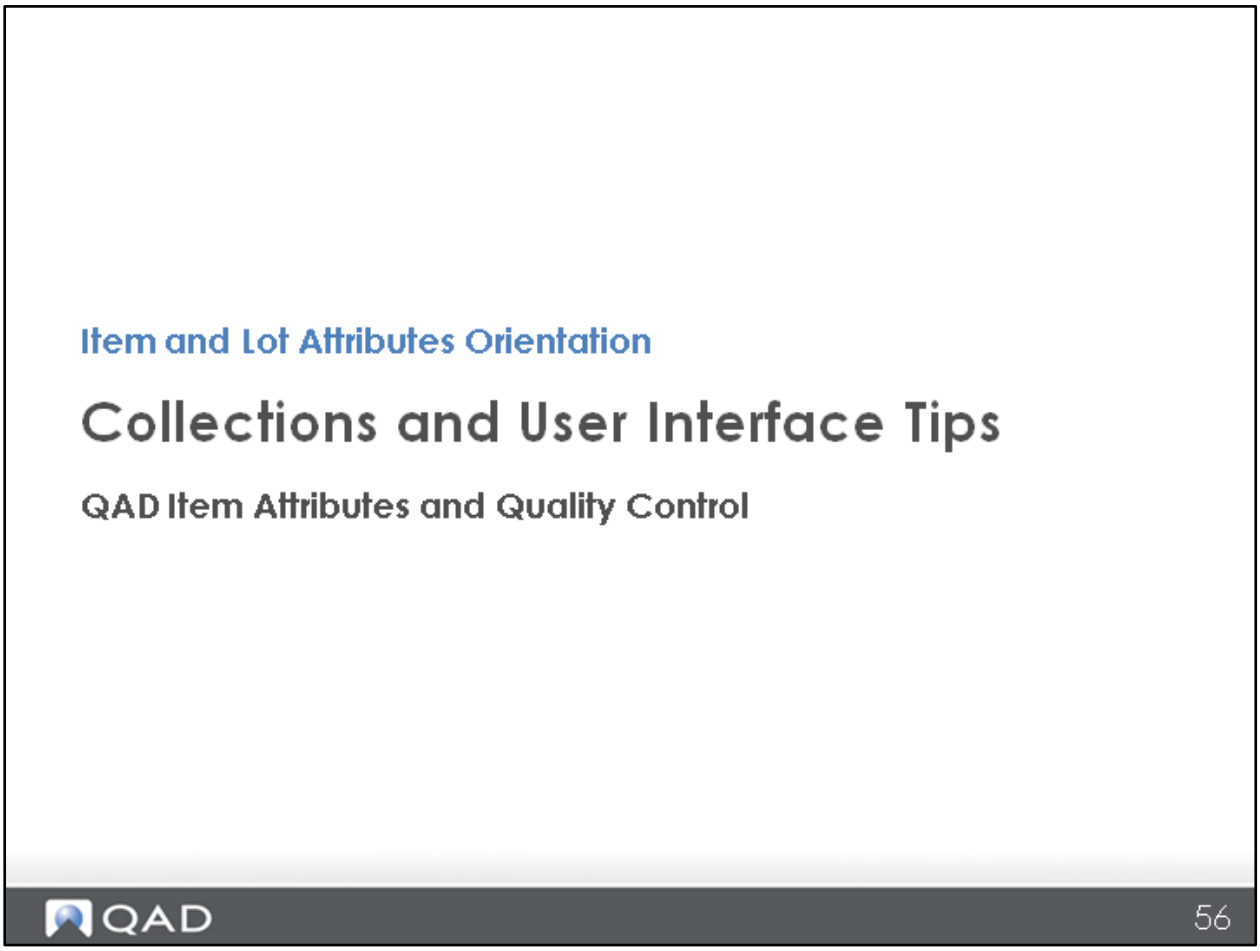


Use the Item Attributes browse to create and modify attributes. As with other functions, data for Item Attributes and Quality Control is accessed through either a browse or a browse collection. From here, you can enter the defining characteristics of an attribute and attach the correct label set.

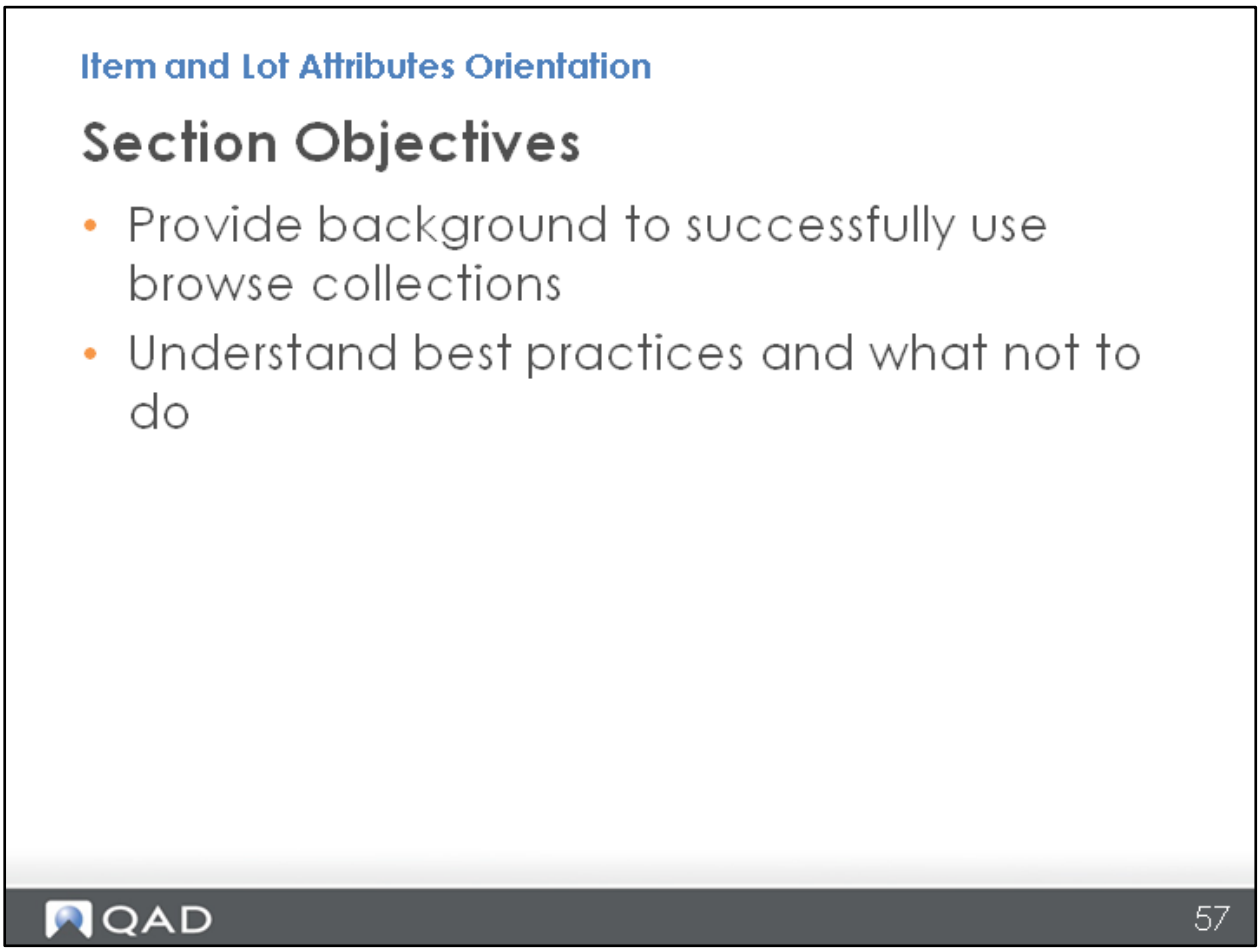
Exercise


IAQ Setup
Exercise
Objective
Gain basic experience maintaining labels and item attributes
Add a label then add item attributes as required to support
Voltage
Format and datatype to accept integer values to 999
Voltage
format and datatype to accept decimal values to 99.99
QAD
55

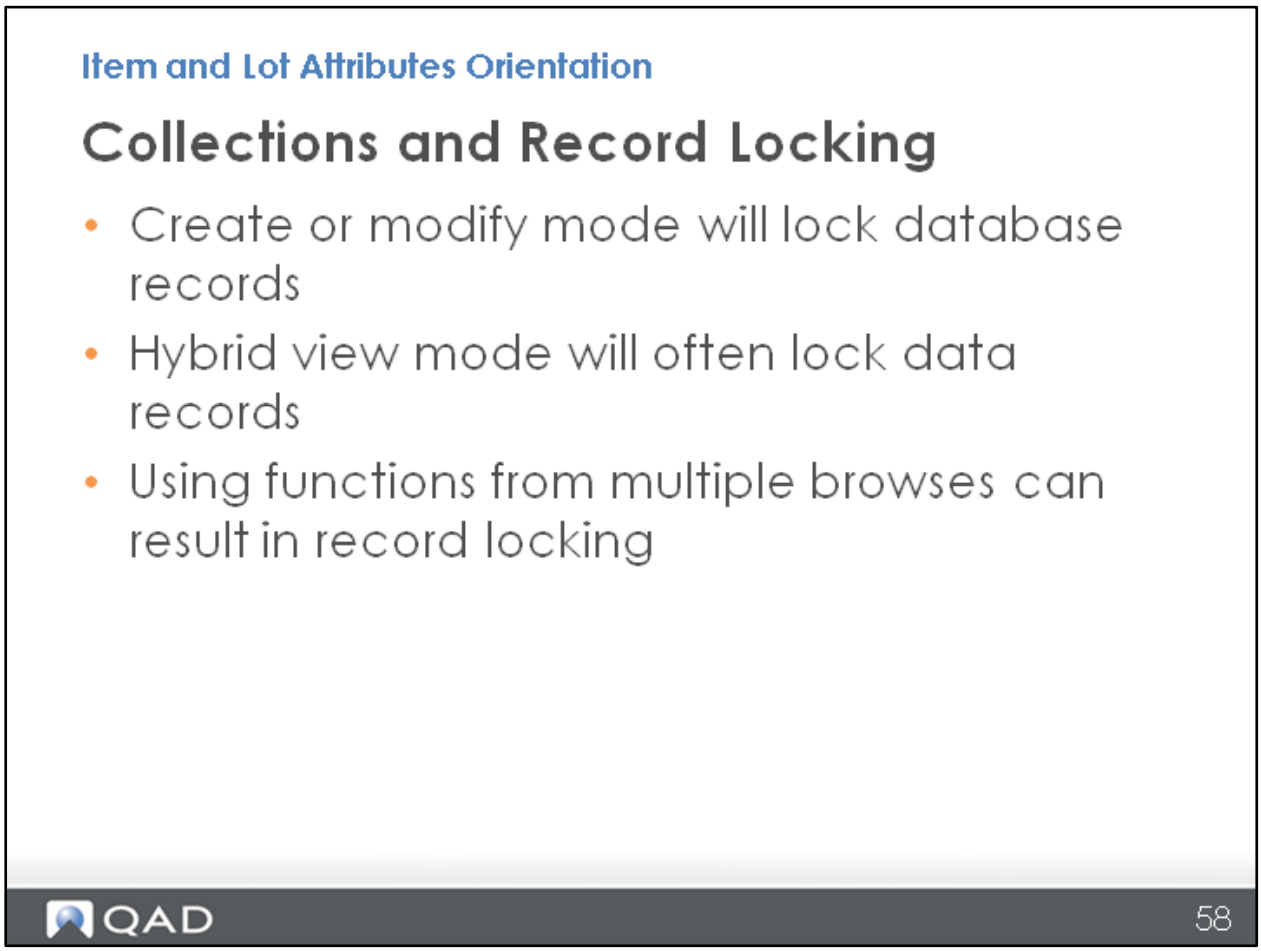
Collections and User Interface Tips



Section Objectives



Collections and Record Locking

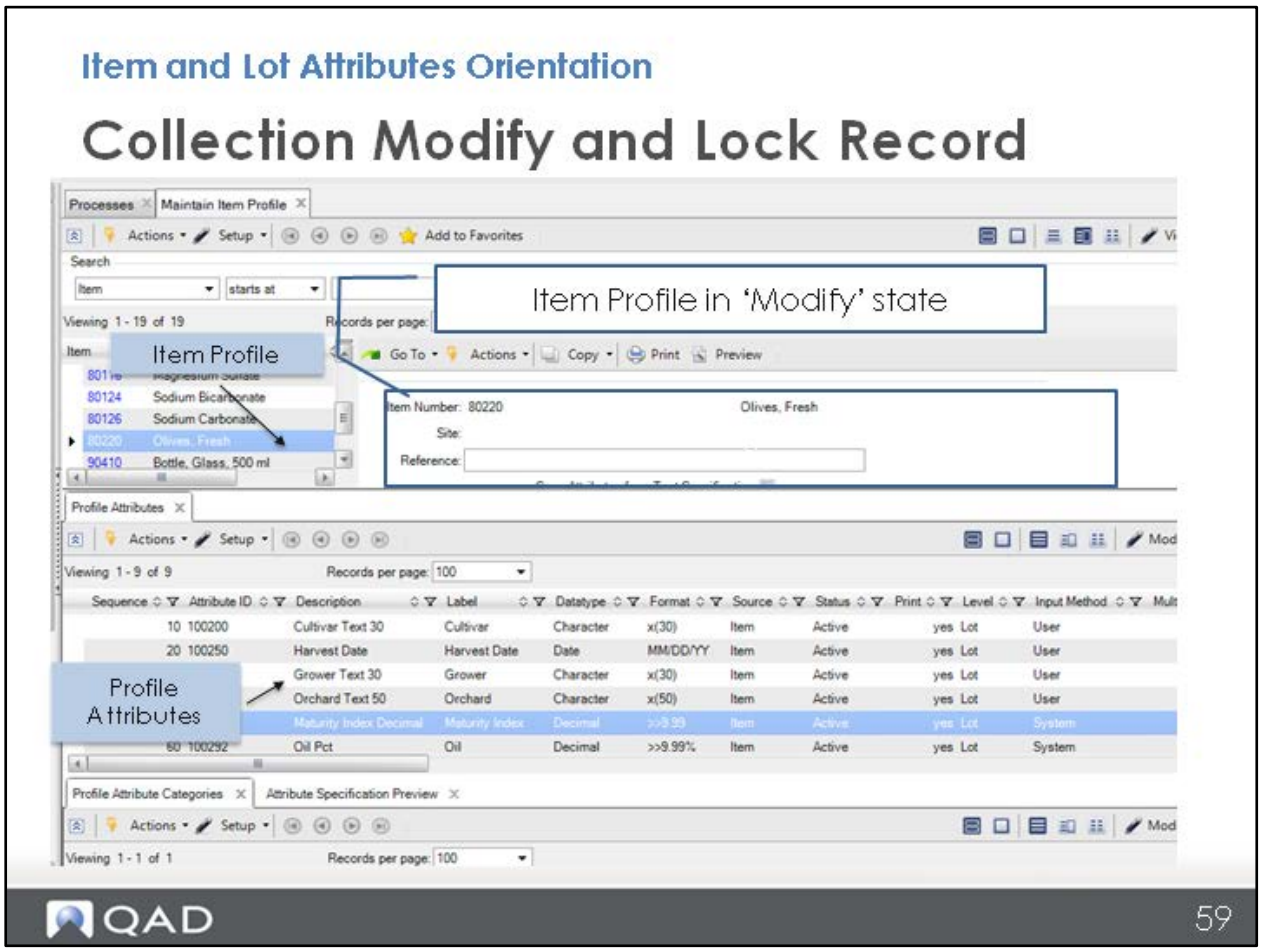


One of the most common problems that users encounter when first using browse collections is record locking, where the locked record is locked by the user by her or himself.

Locked records prevent users from accessing or editing certain records. This happens because the records are in use by the system.

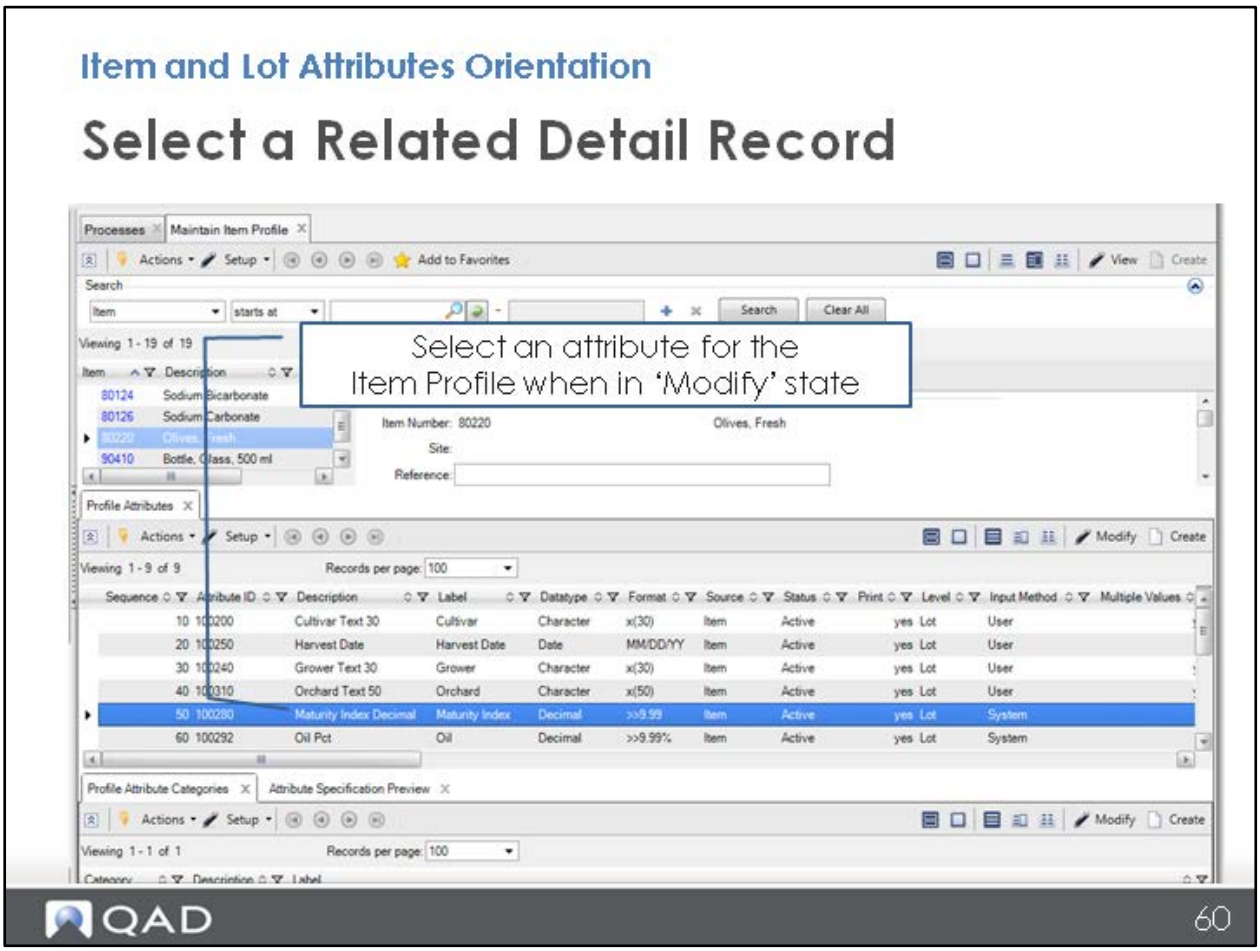
There are two common causes of record locking. The first is entering create or modify mode with a record. The second is to access different browses within the same collection.

Collection Modify and Lock Record



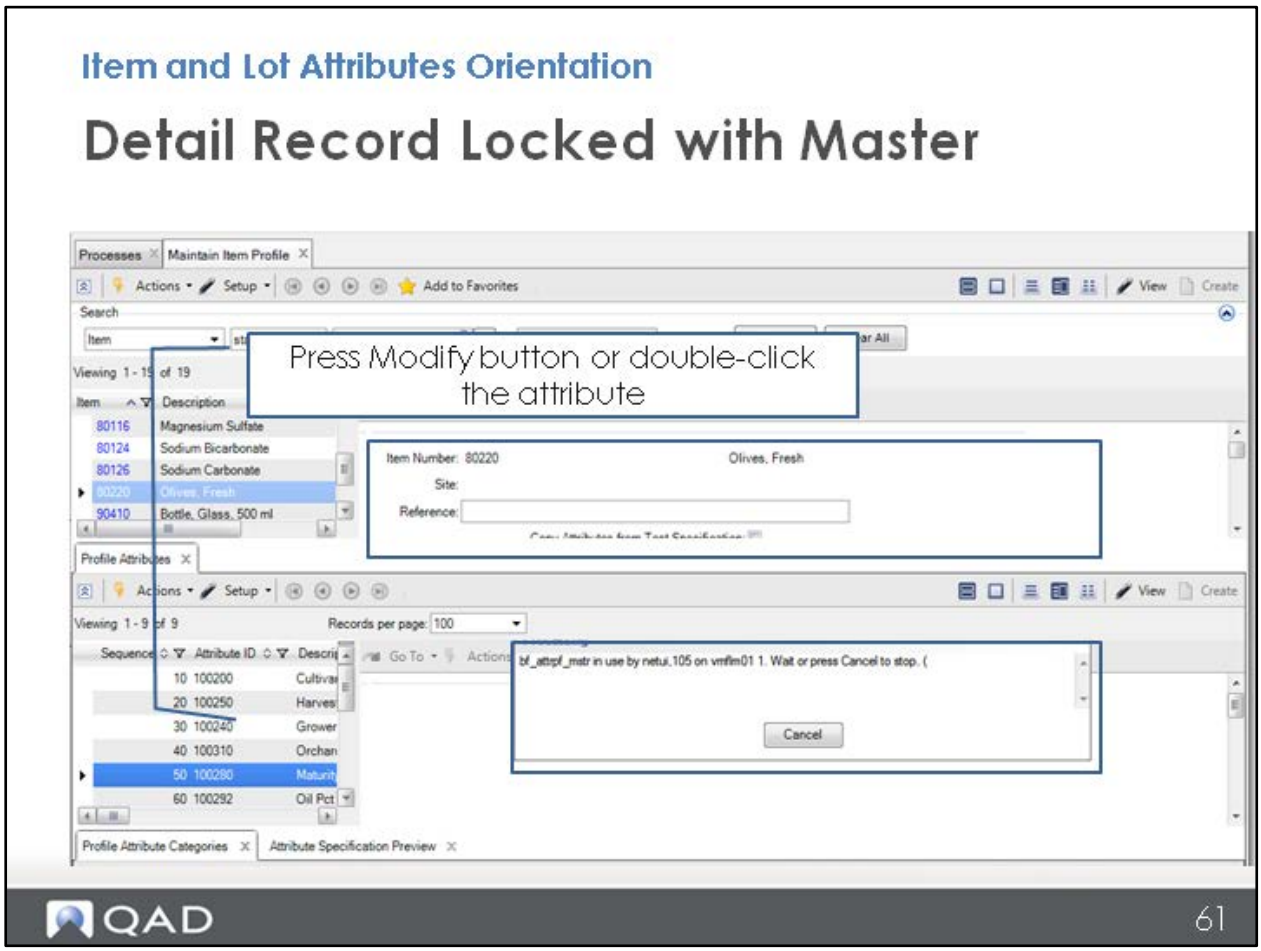
When you create or modify a record, that record enters the modify state. While in the modify state, a record is locked. Accessing it elsewhere while result in an error.

Select a Related Detail Record



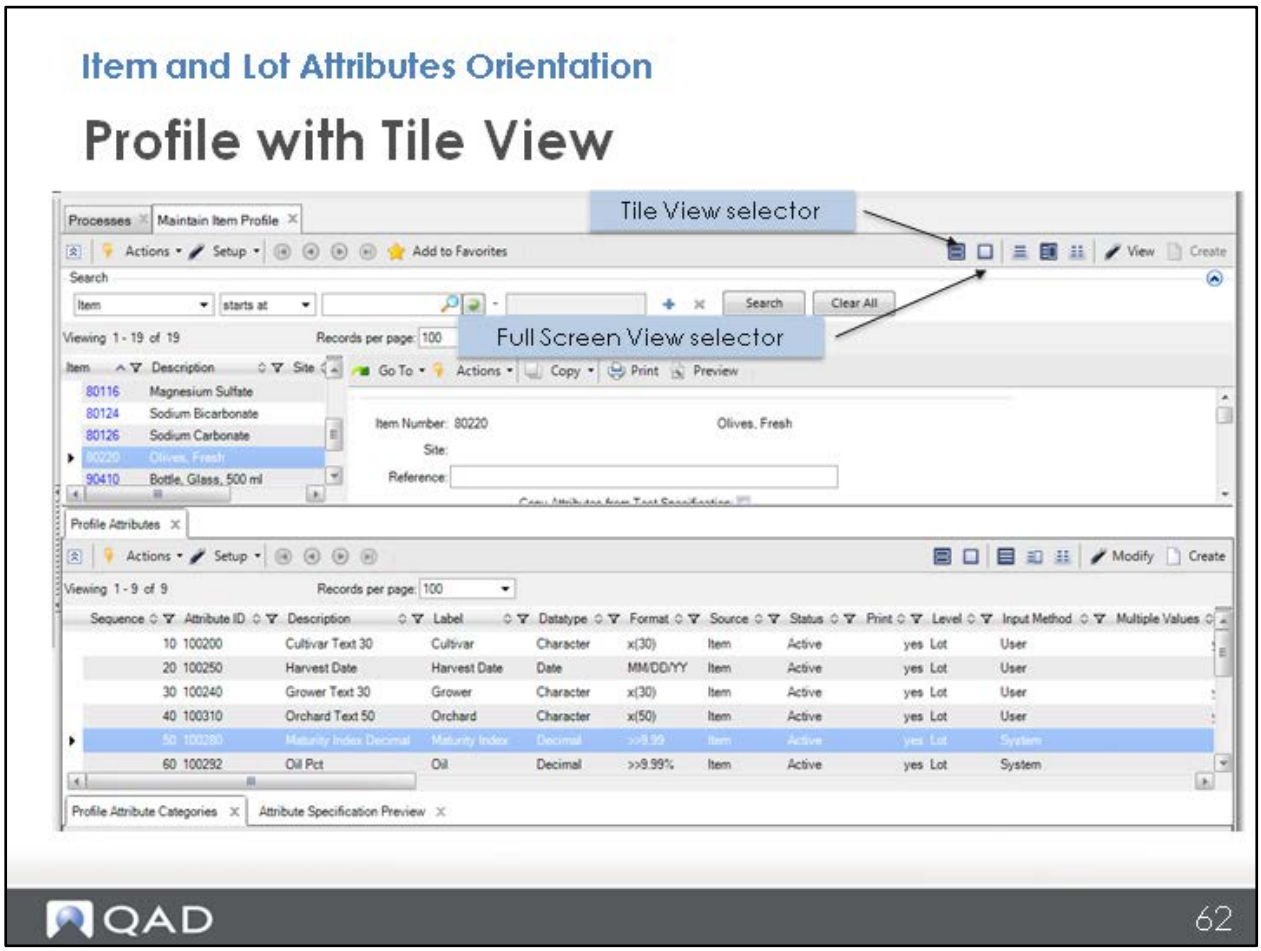
While a record is in the modify state, the records in more detailed levels of its browse collection are also locked.

Detail Record Locked with Master



Attempting to modify or create a record in a lower level browse of a locked attribute will result in an error.

Profile with Tile View

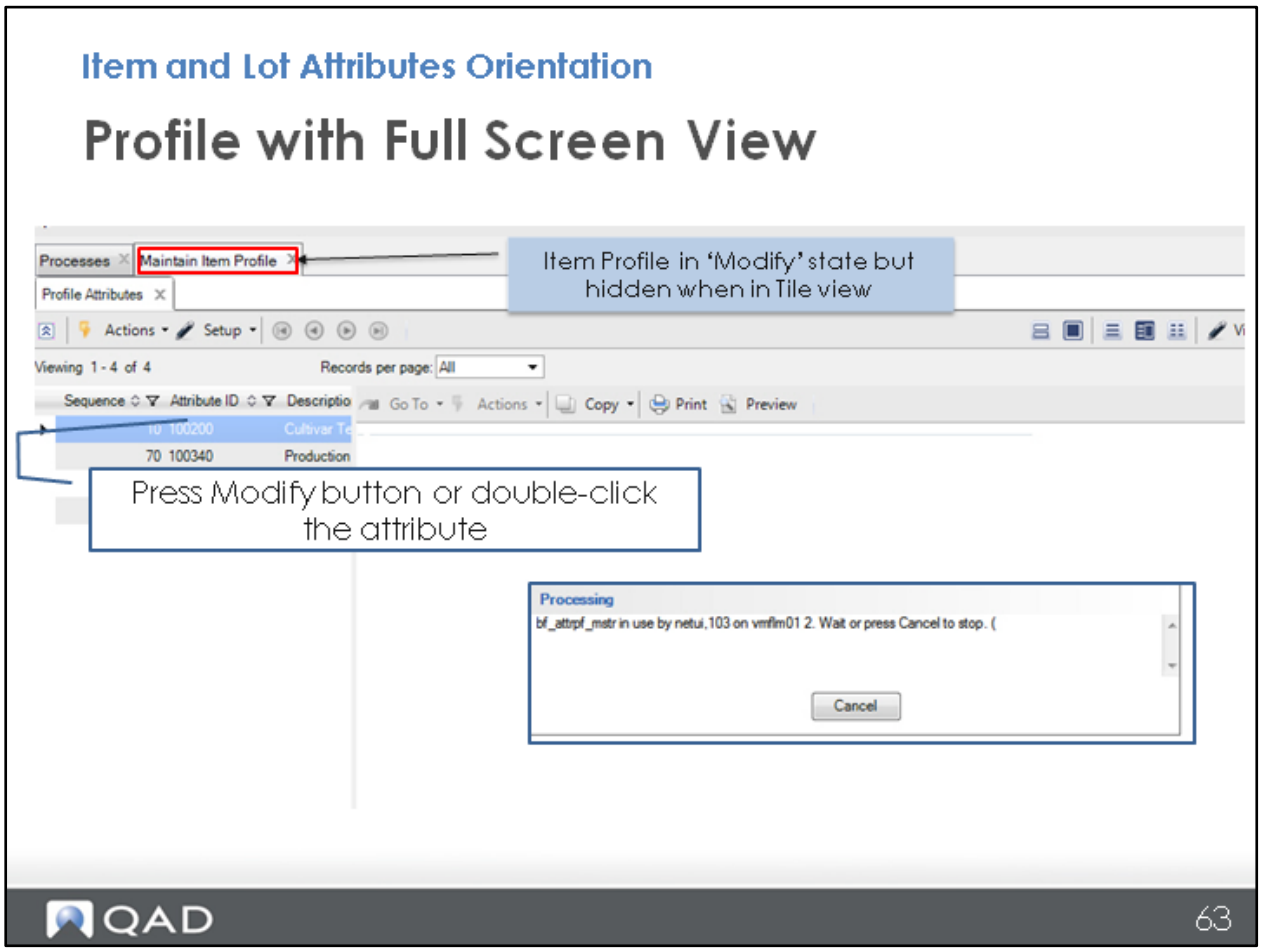


When using QAD EE, you have multiple options for viewing browses and browse collections.

The Tile View presents all levels of a browse collection, at once, tiled downward by hierarchy. This option provides the most complete view of the browse hierarchy.

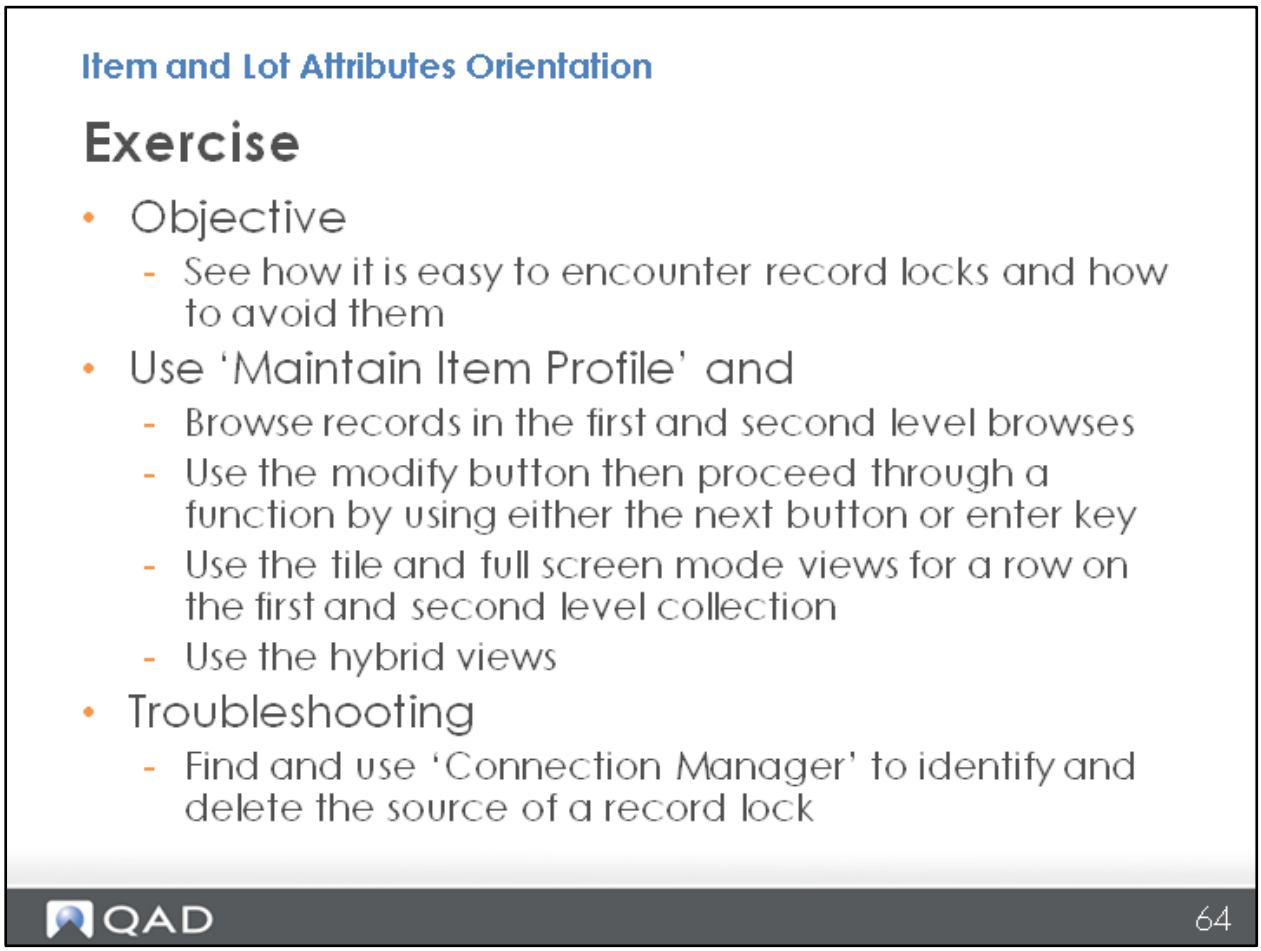
The Full Screen View expands the selected browse to fill the screen. This minimizes higher level browses and hides lower level browses. This option makes the browse significantly easier to use.

Profile with Full Screen View



Note that minimizing higher level browses may hide that a record is in the modify state. Lower level records are still locked when the higher level record is in the modify state, even when it is hidden.

Exercise


Item and Lot Attributes Orientation
Exercise
Objective
See how it is easy to encounter record locks and how to avoid them
Use 'Maintain Item Profile' and
Browse records in the first and second level browses
Use the modify button then proceed through a function by using either the next button or enter key
Use the tile and full screen mode views for a row on the first and second level collection
Use the hybrid views
Troubleshooting
Find and use 'Connection Manager' to identify and delete the source of a record lock
QAD
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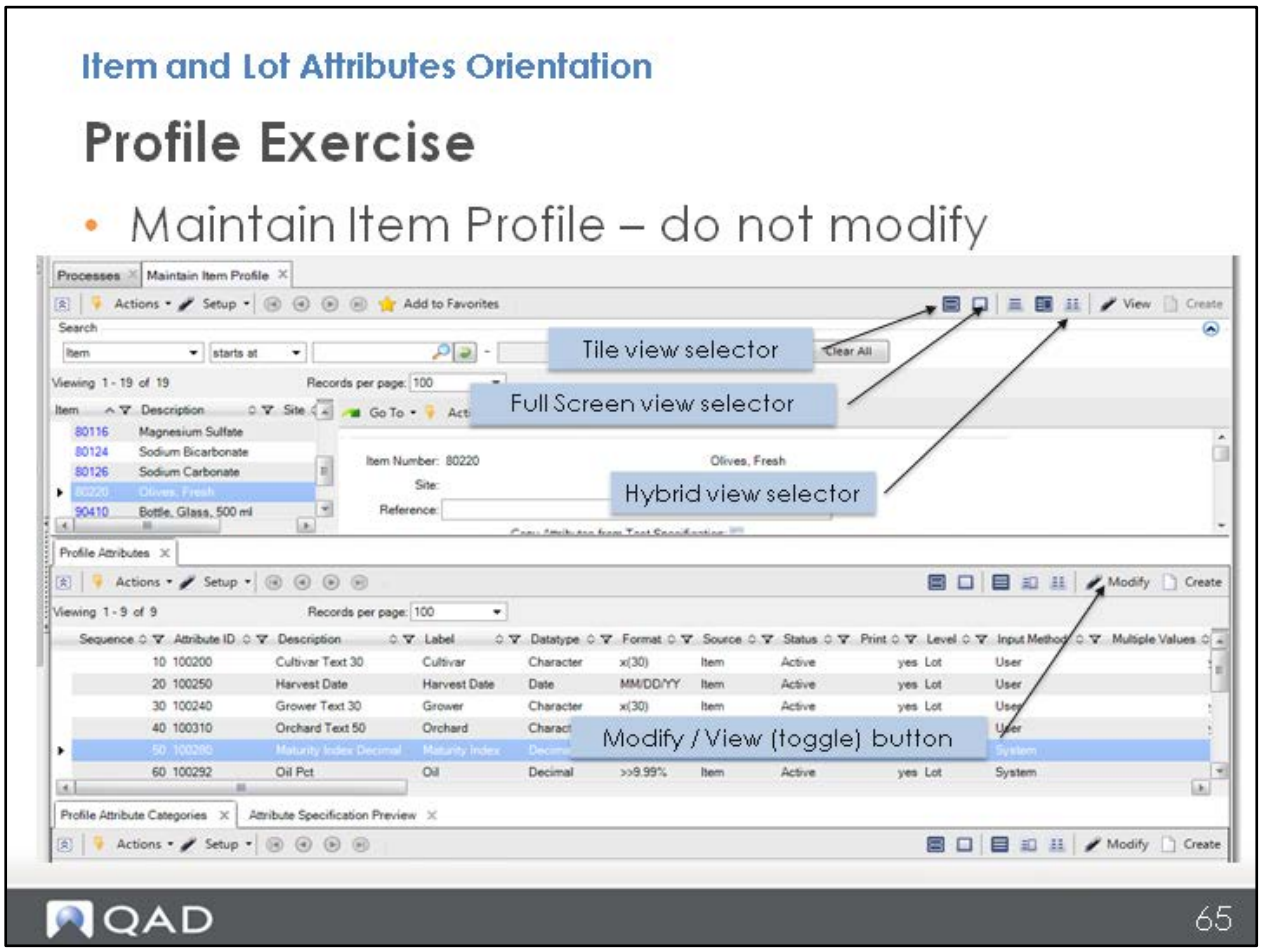
Profile Exercise



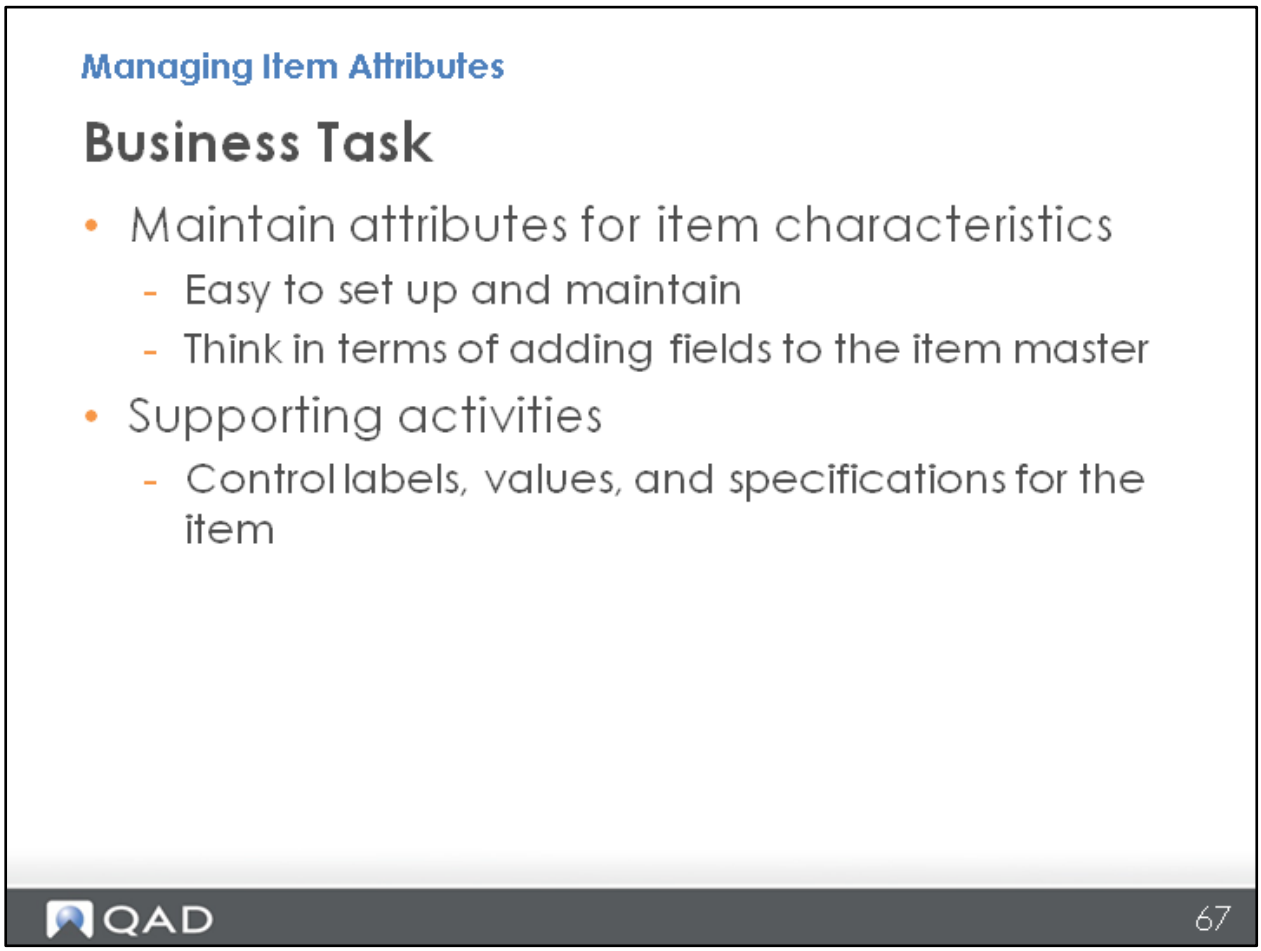
For this exercise, view Maintain Item Profile but do not modify any item profiles.

CHAPTER 4

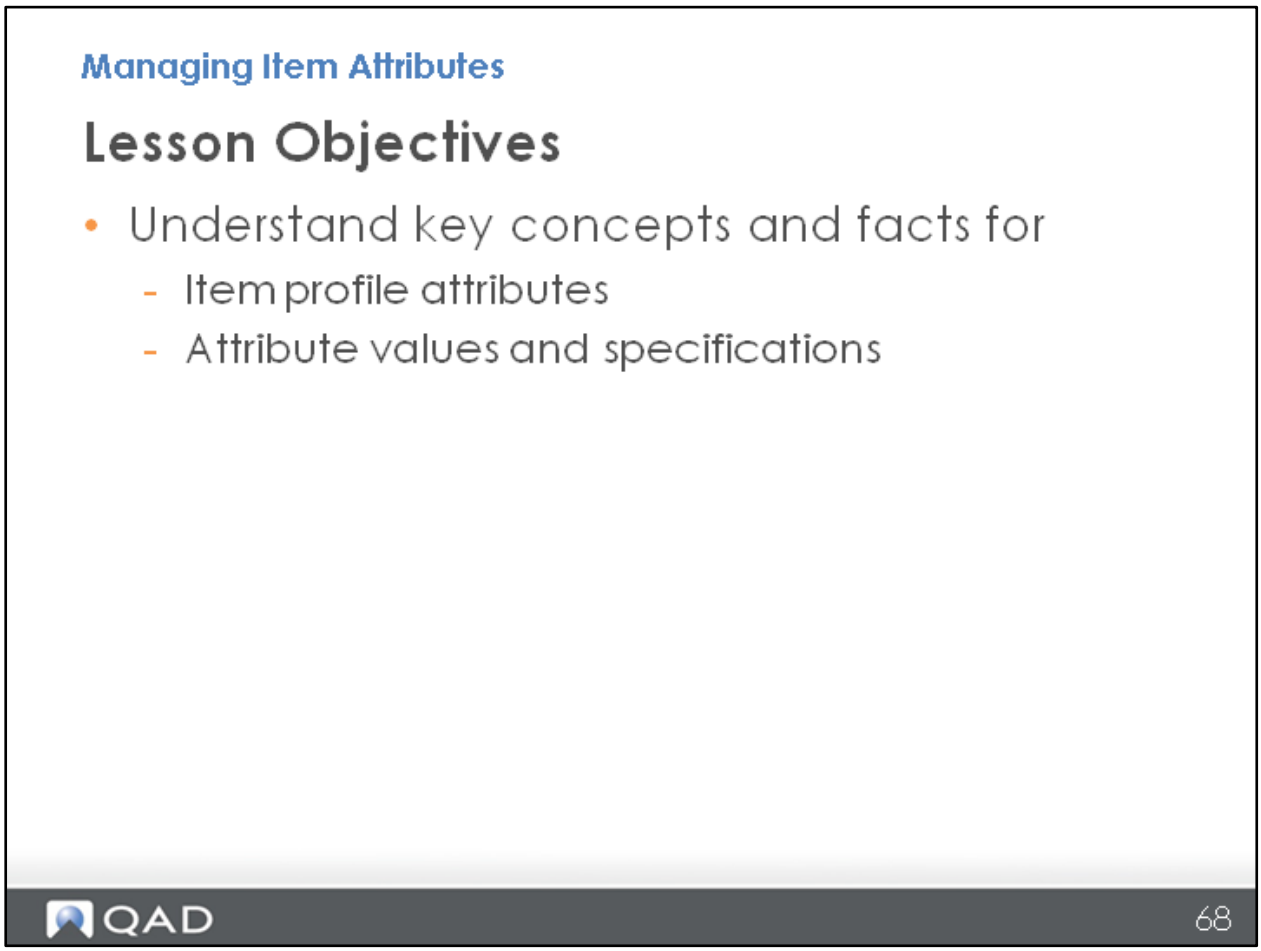
Item Profiles

Managing Item Attributes

Business Task



Lesson Objectives



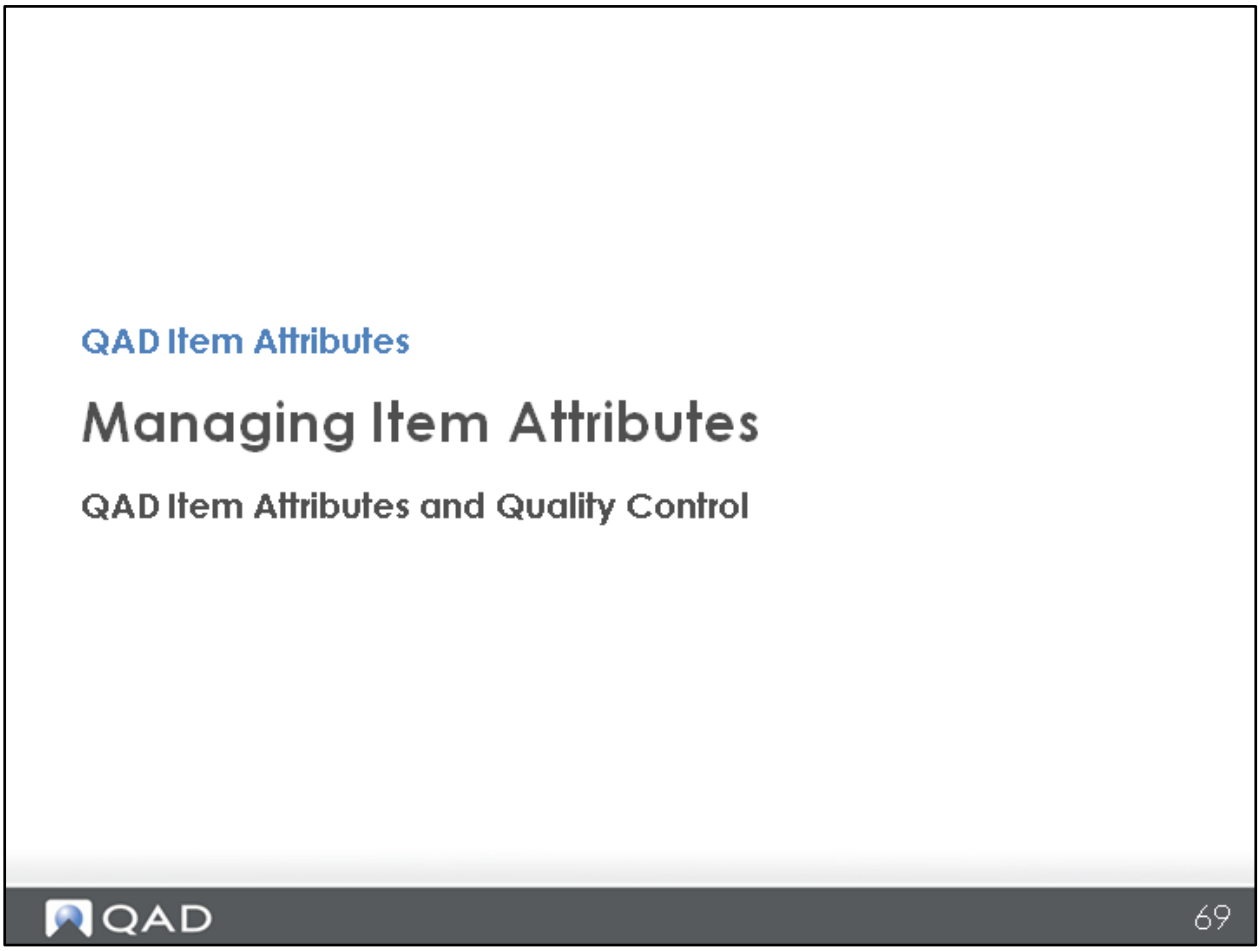
This section of training covers how QAD EE controls lot attributes.

By the end of this training, you will be familiar with the key concepts that explain and enable lot attribute control within QAD EE.

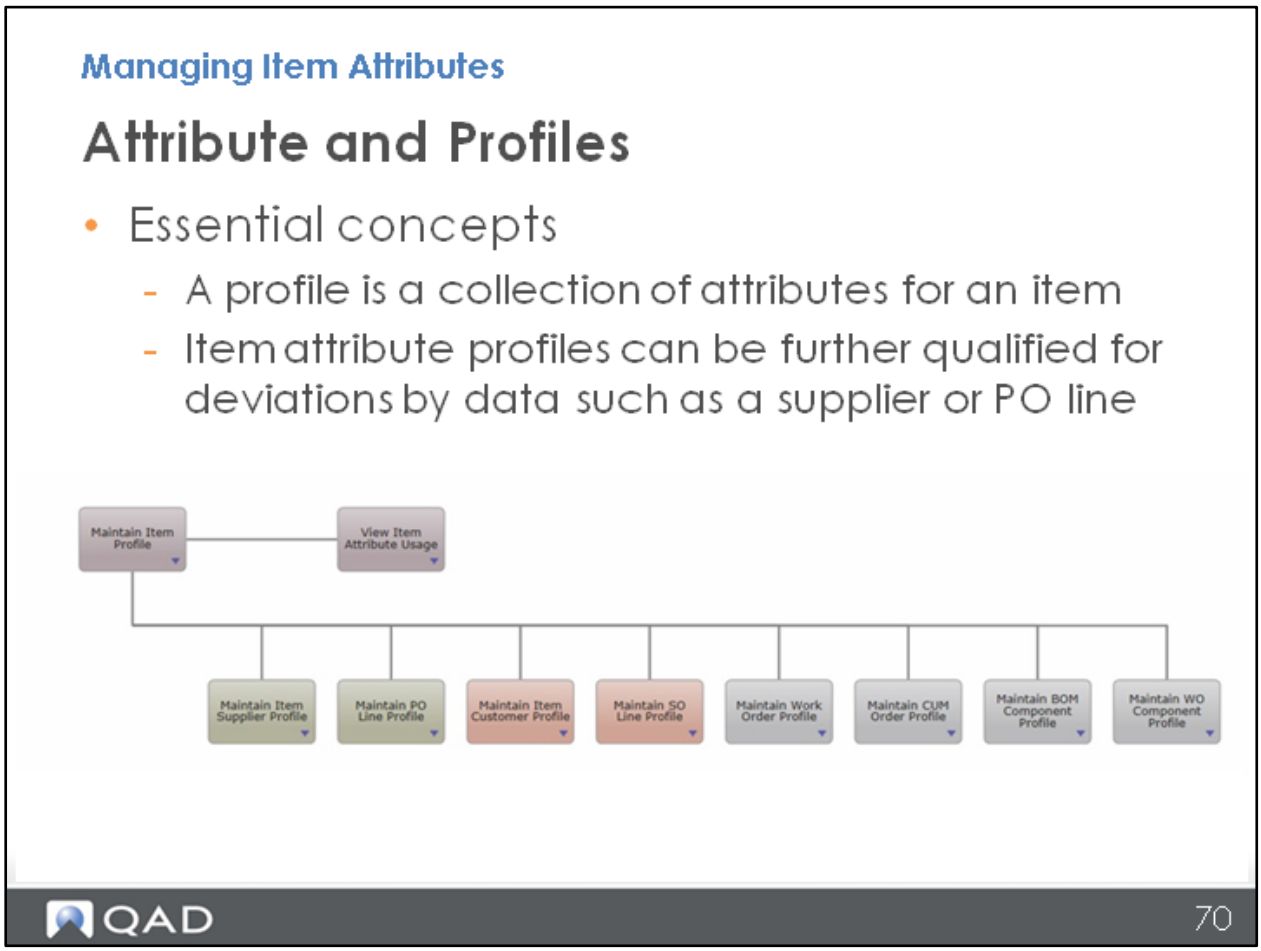
Also, you will understand sublots, and the function they perform within the system.

Then, you will cover how lot attributes differ from inventory detail attributes and how the two interact. Finally, you will cover the actual process of entering values for lot attributes.

Managing Item Attributes



Attribute and Profiles

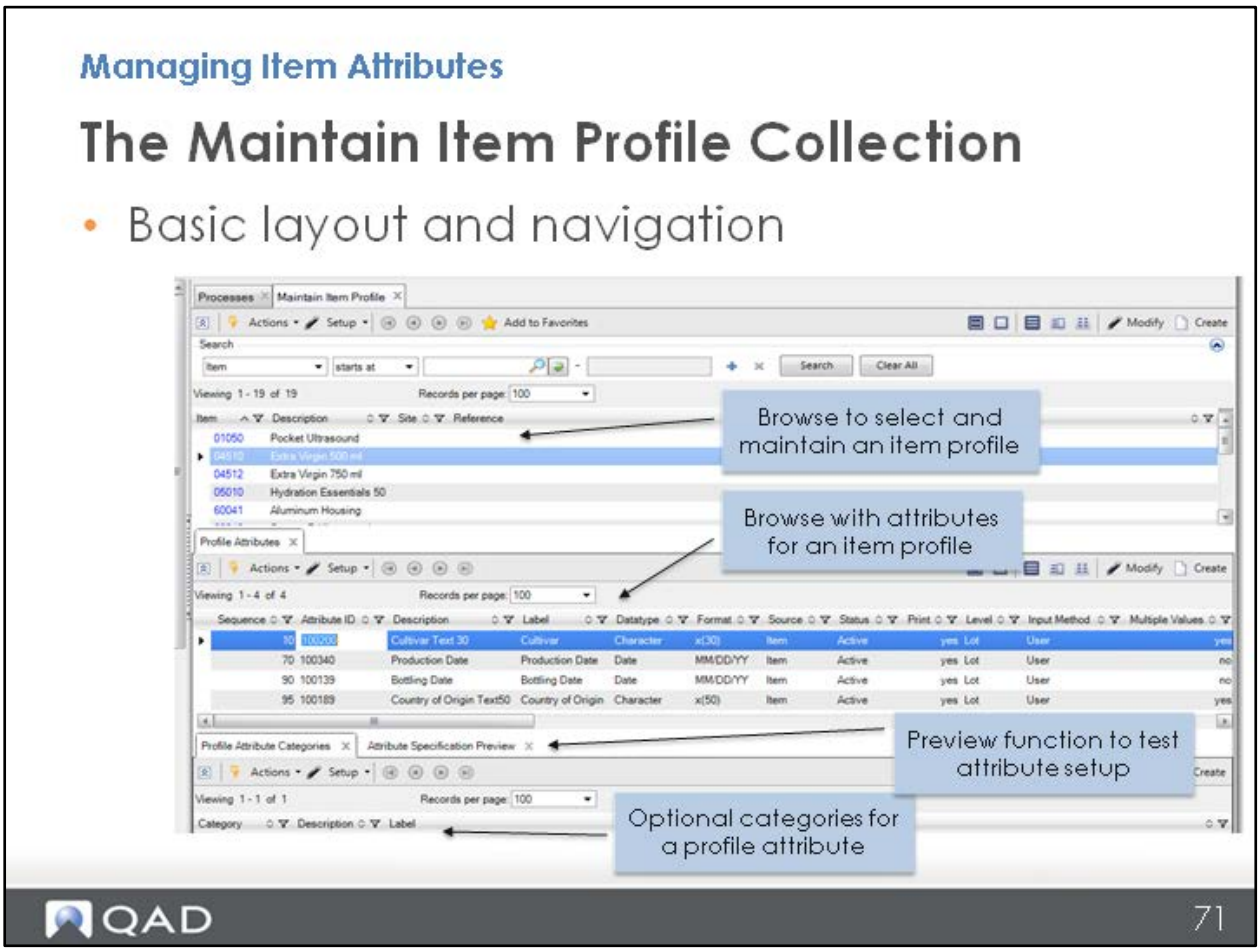


The essential concept is that a profile is the specific collection of attributes, from all of the available attributes, that apply to a specific item.

To begin, access Maintain Item Profile within the process maps.

Find this option under Home > Manage Enterprise Item Attributes > Set Up Item Attributes and Profiles > Manage Attribute Profiles

The Maintain Item Profile Collection

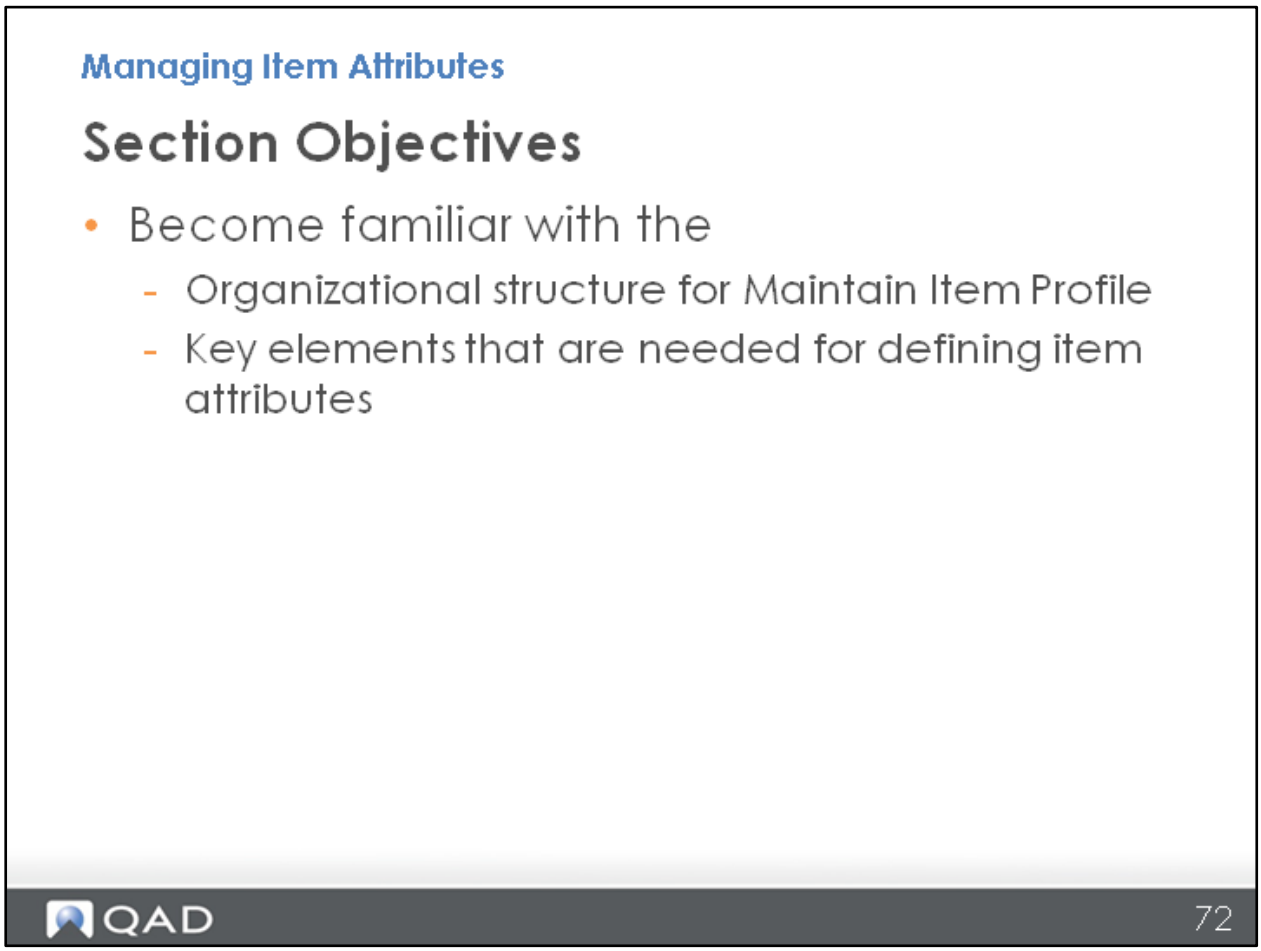


The Maintain Item Profile browse collection allows you to create, modify, and view item profiles.

The second level Profile Attributes tab within the browse collection stores information on the attributes associated with each profile.

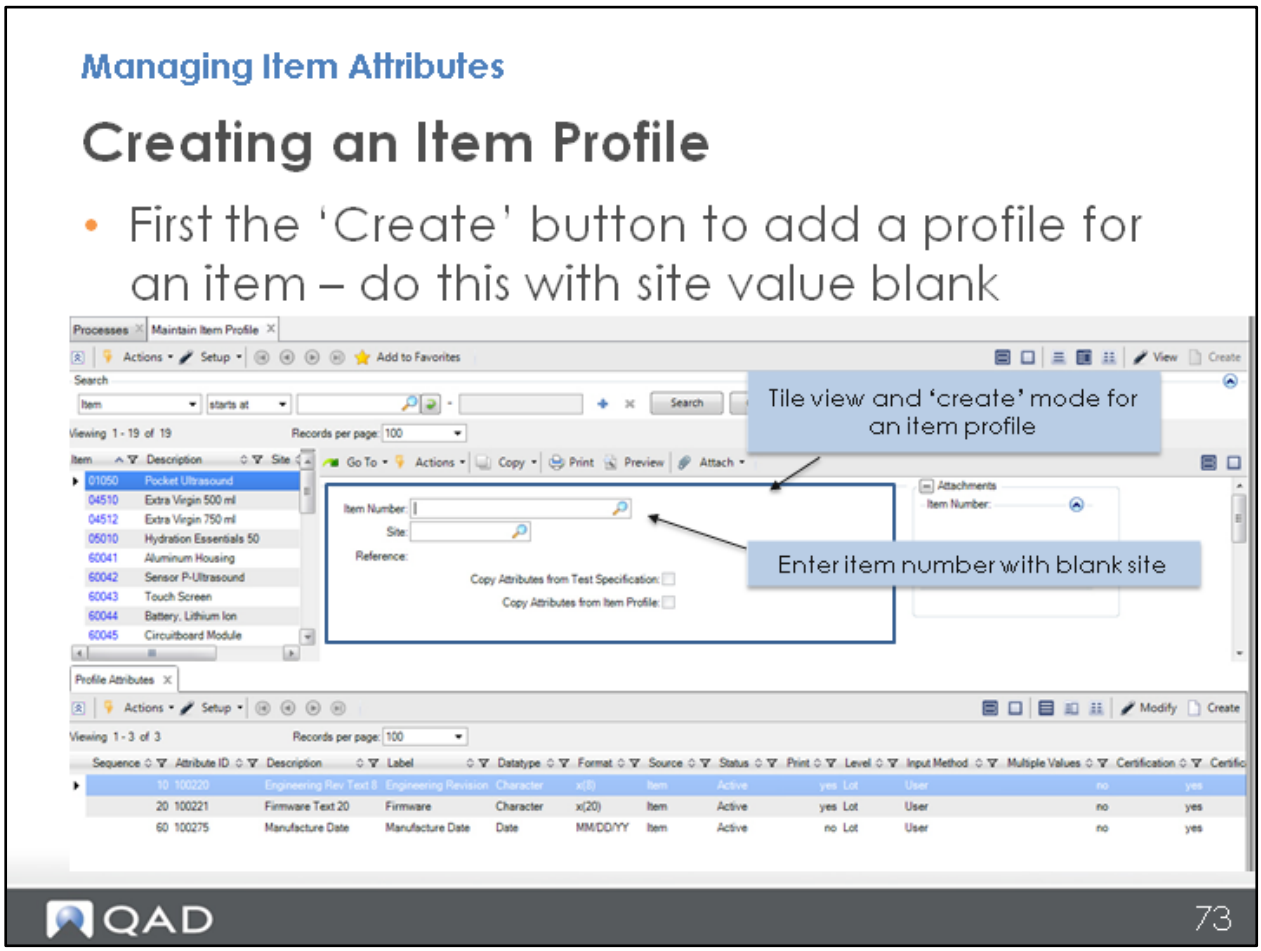
In the picture above, you can see the profile attributes associated with the selected item profile.

Section Objectives



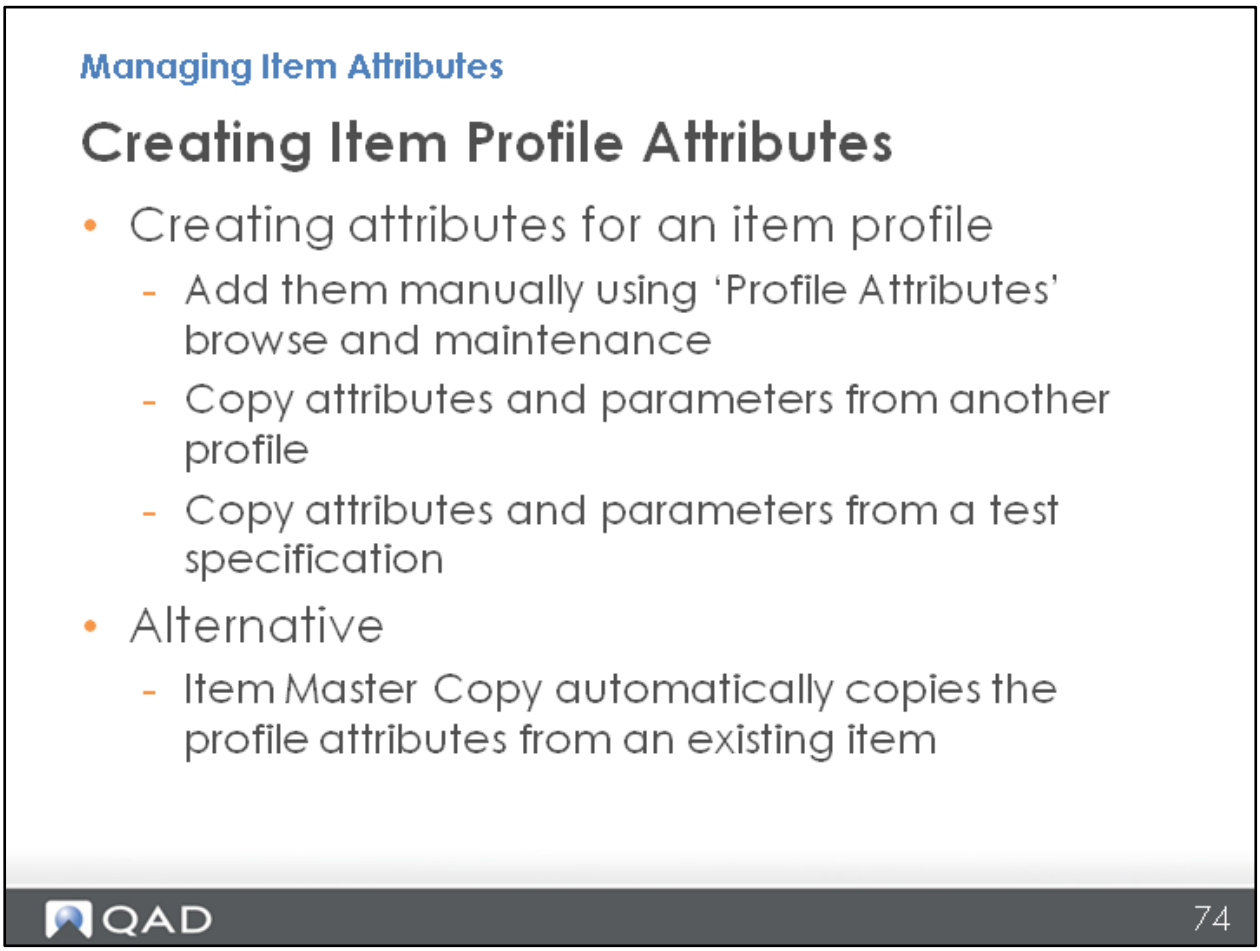
When you finish this section of training, you will be able to manage fixed value attributes for an item – attributes that are essentially an extension of what you might see in Item Master Maintenance

Creating an Item Profile



When specifying attributes for an items for a site and for the item across all sites, first define the attribute for the item with a blank site as a general definition for the item and attribute. Do this to prevent potential conflicts between site specific definitions for the item and attribute and the general definition for the item and attribute.

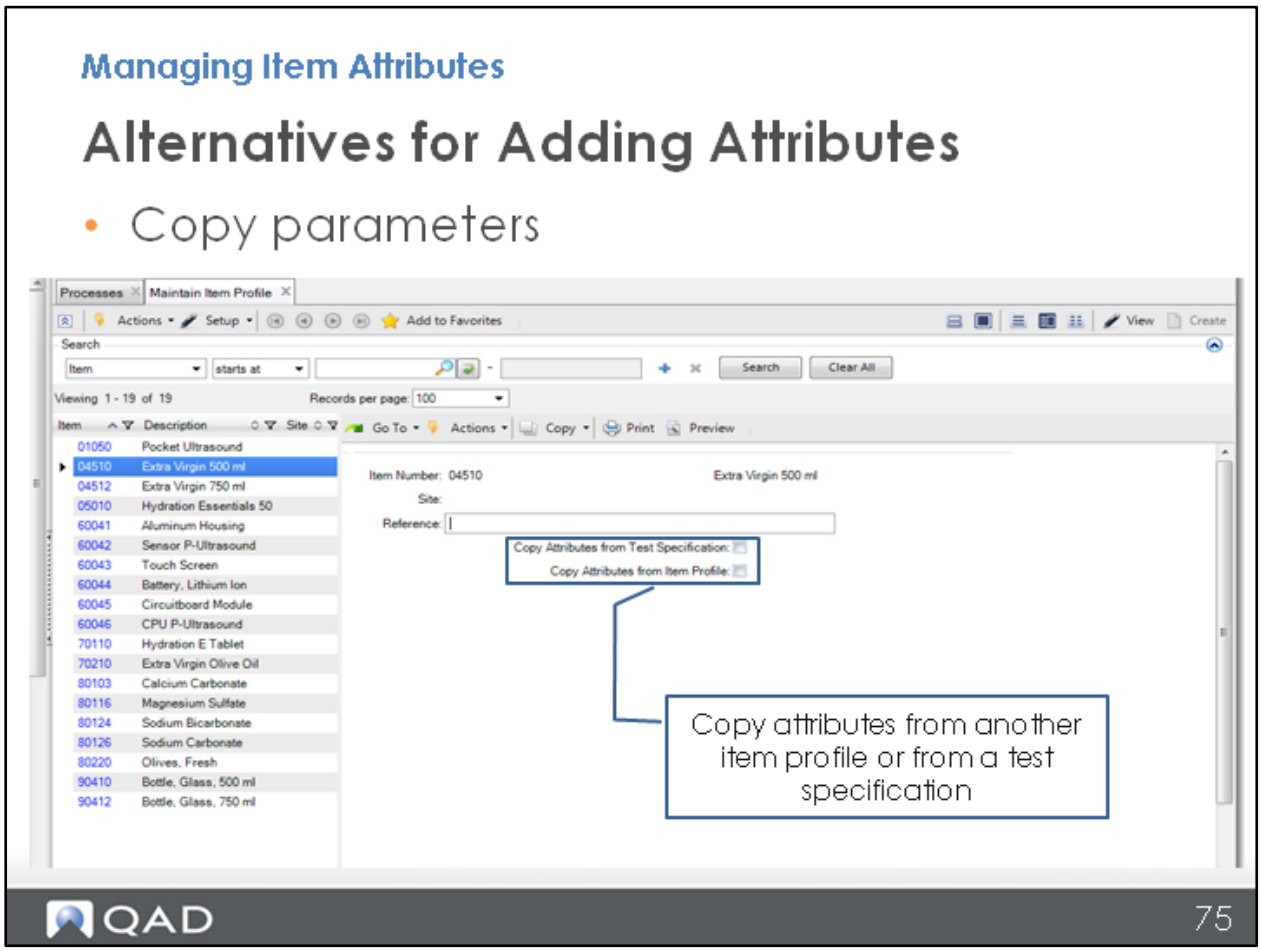
Creating Item Profile Attributes



You can create a new profile manually.

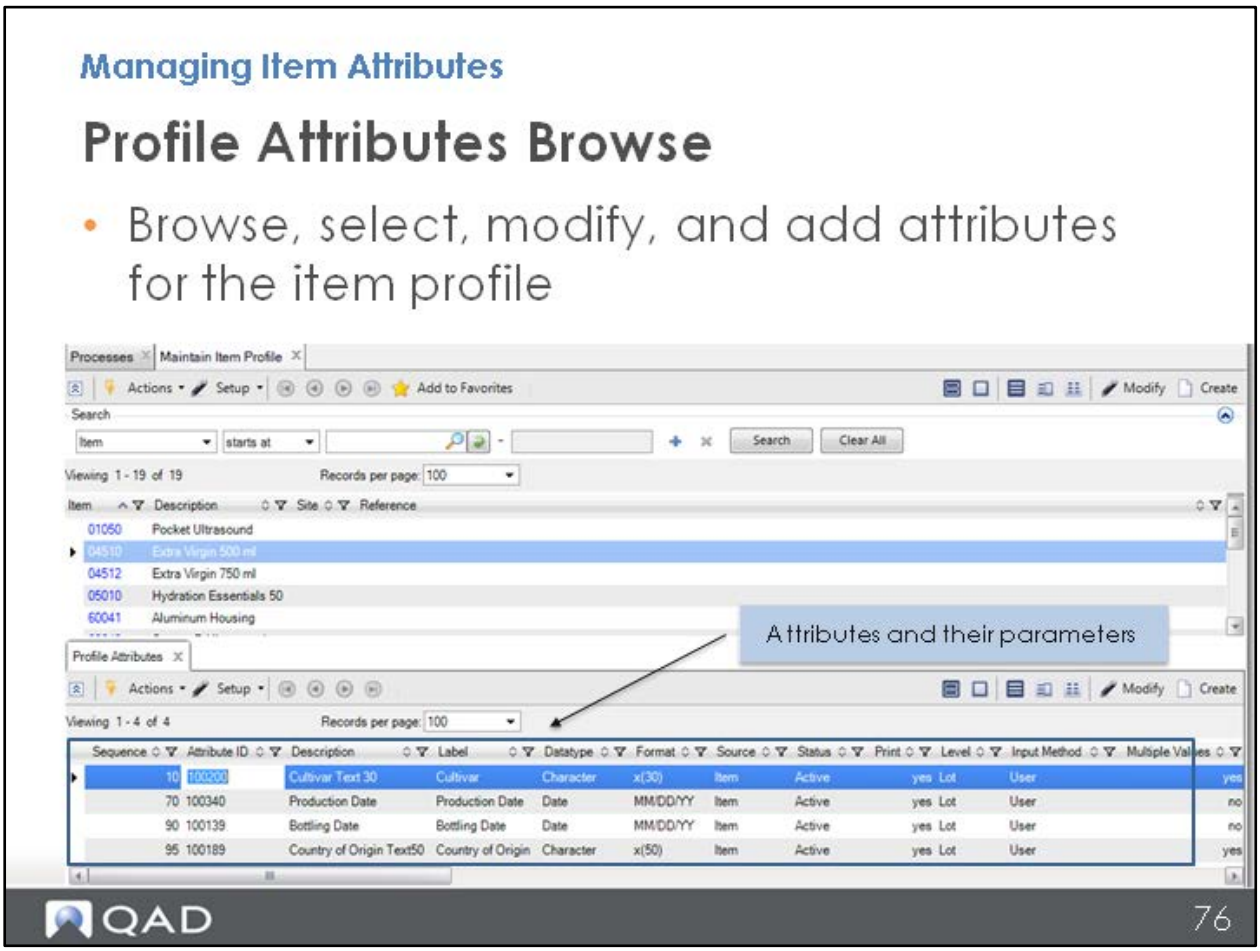
When doing so, it is possible to copy attributes directly from other profiles or test specifications. This can save time and reduce errors.

Alternatives for Adding Attributes



To create a new profile, click the Create button in the top-right corner of the Maintain Item Profile browse. Then, you can select to copy attributes from test specifications, item profiles, or both.

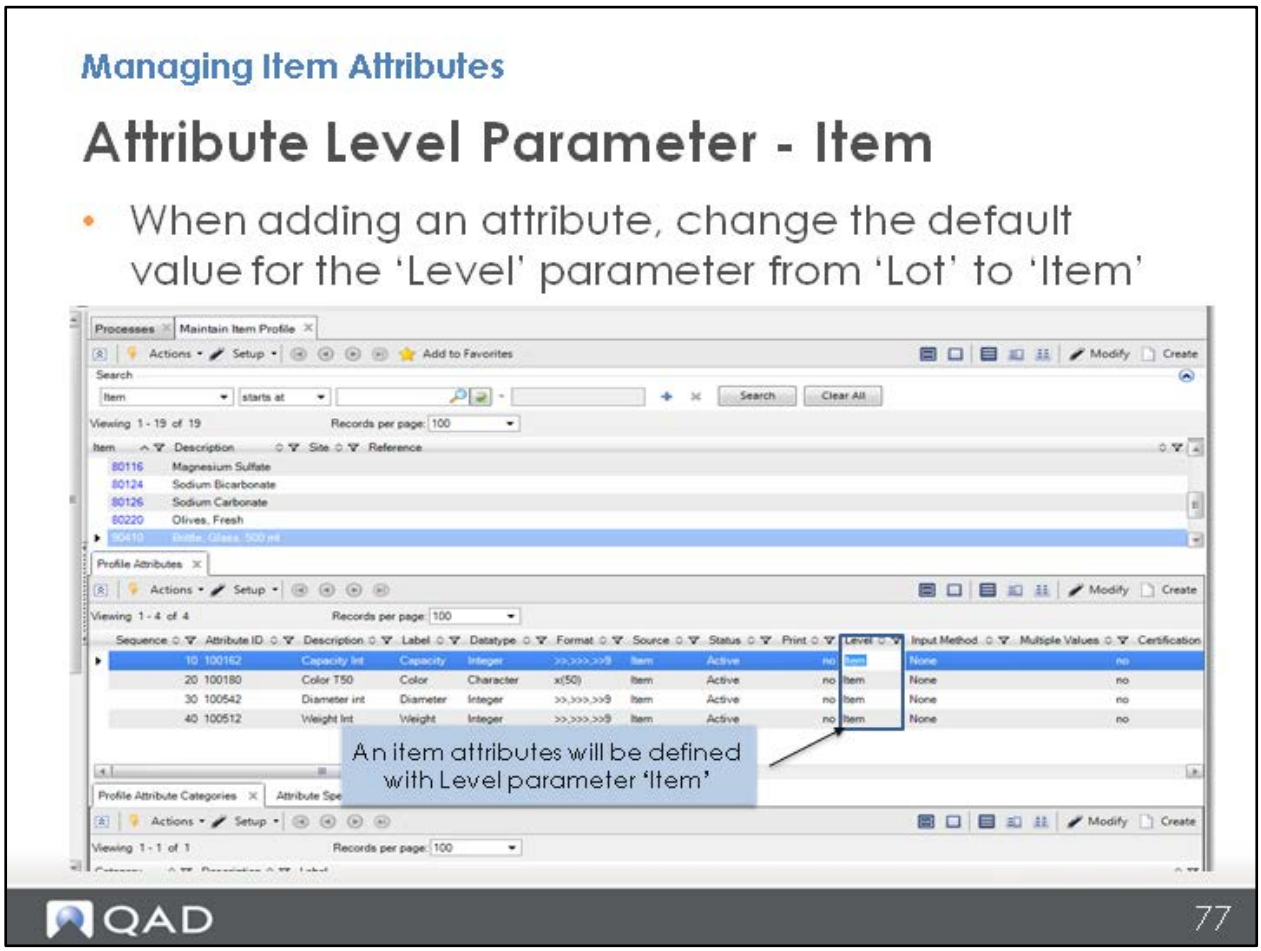
Profile Attributes Browse



The second level Profile Attributes tab within the browse collection stores information on the attributes associated with each profile.

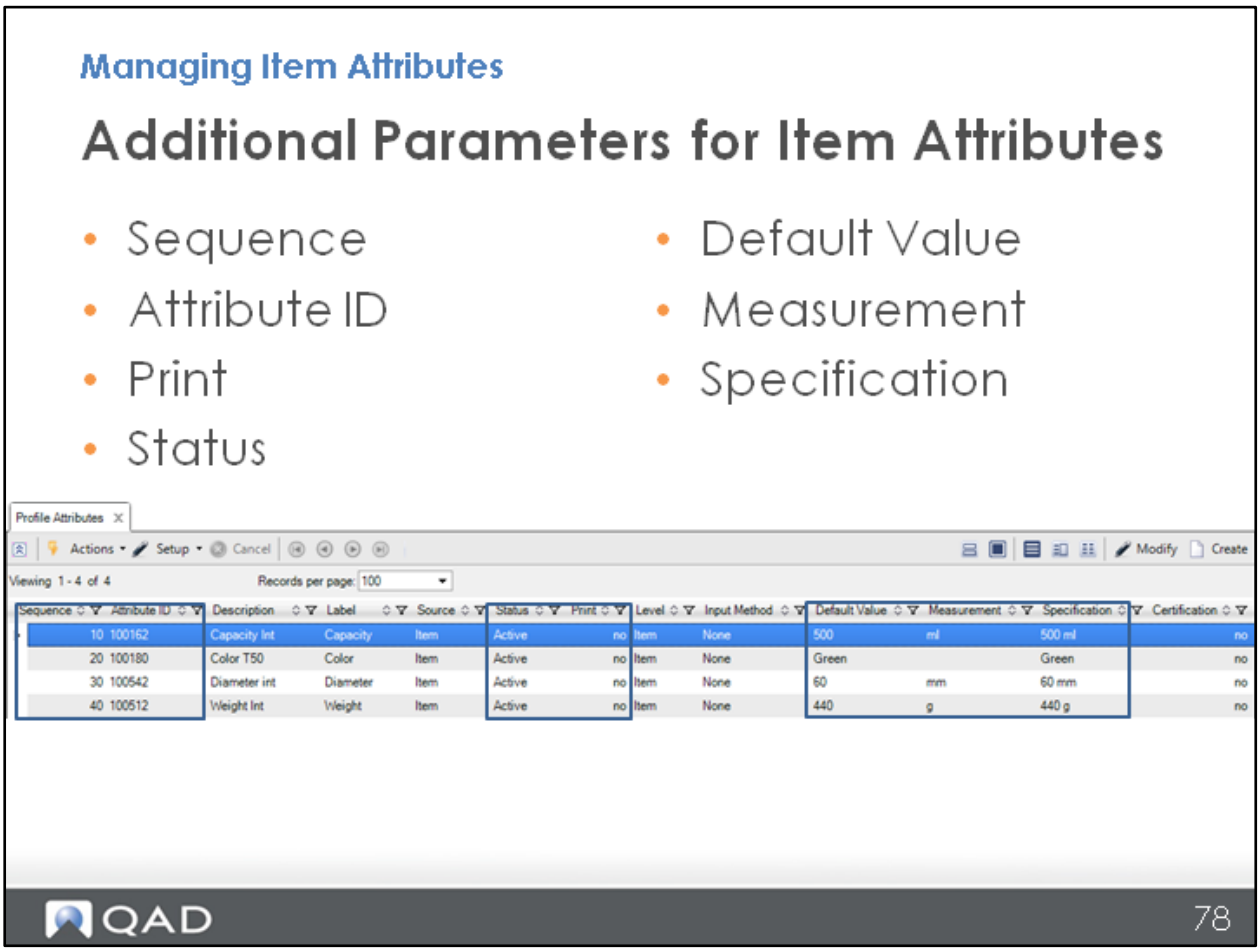
In the picture above, you can see the profile attributes associated with the selected item profile.

Attribute Level Parameter - Item



Each profile attribute has a Level which denotes the source of the attribute. Item attributes should all have Level set to 'Item'.

Additional Parameters for Item Attributes

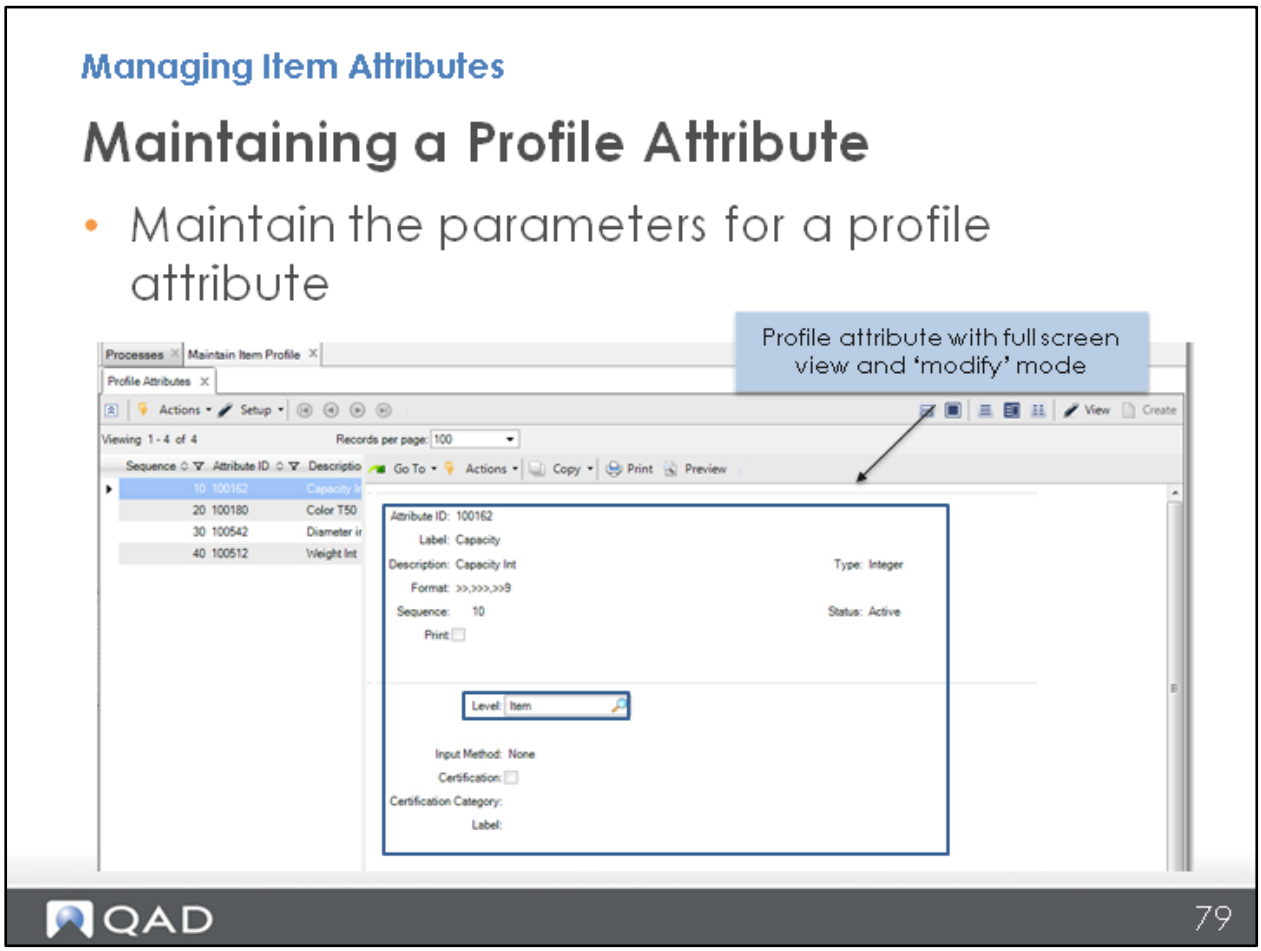


In addition to their Level, these are the parameters that should be considered for an item attribute.

At the moment, pay close attention to the following:

- **Sequence**. The order in which attributes appear by default
- **Attribute ID**. The unique identifier of an attribute within the system
- **Status**. Whether the attribute is currently in use
- **Default Value**. The nominal value for the attribute
- **Measurement**. The measure for an attribute specification (not the same as UM)
- **Specification**. The nominal specification for the attribute

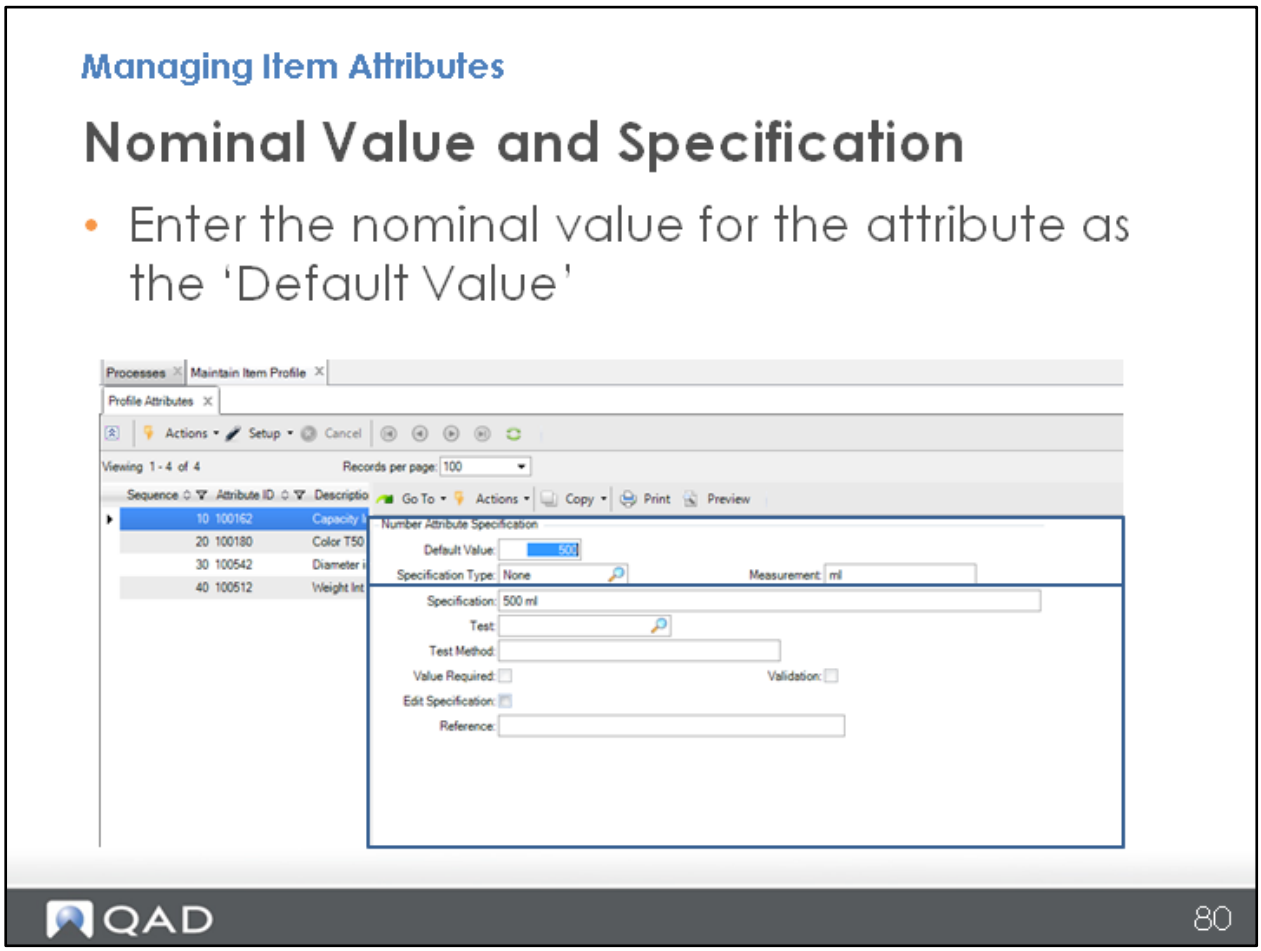
Maintaining a Profile Attribute



In addition, attributes also have a certification parameter. This determines whether the attribute appears on certificates of analysis.

To access this parameter, enter modify mode and click 'Next' until the Certification parameter becomes editable.

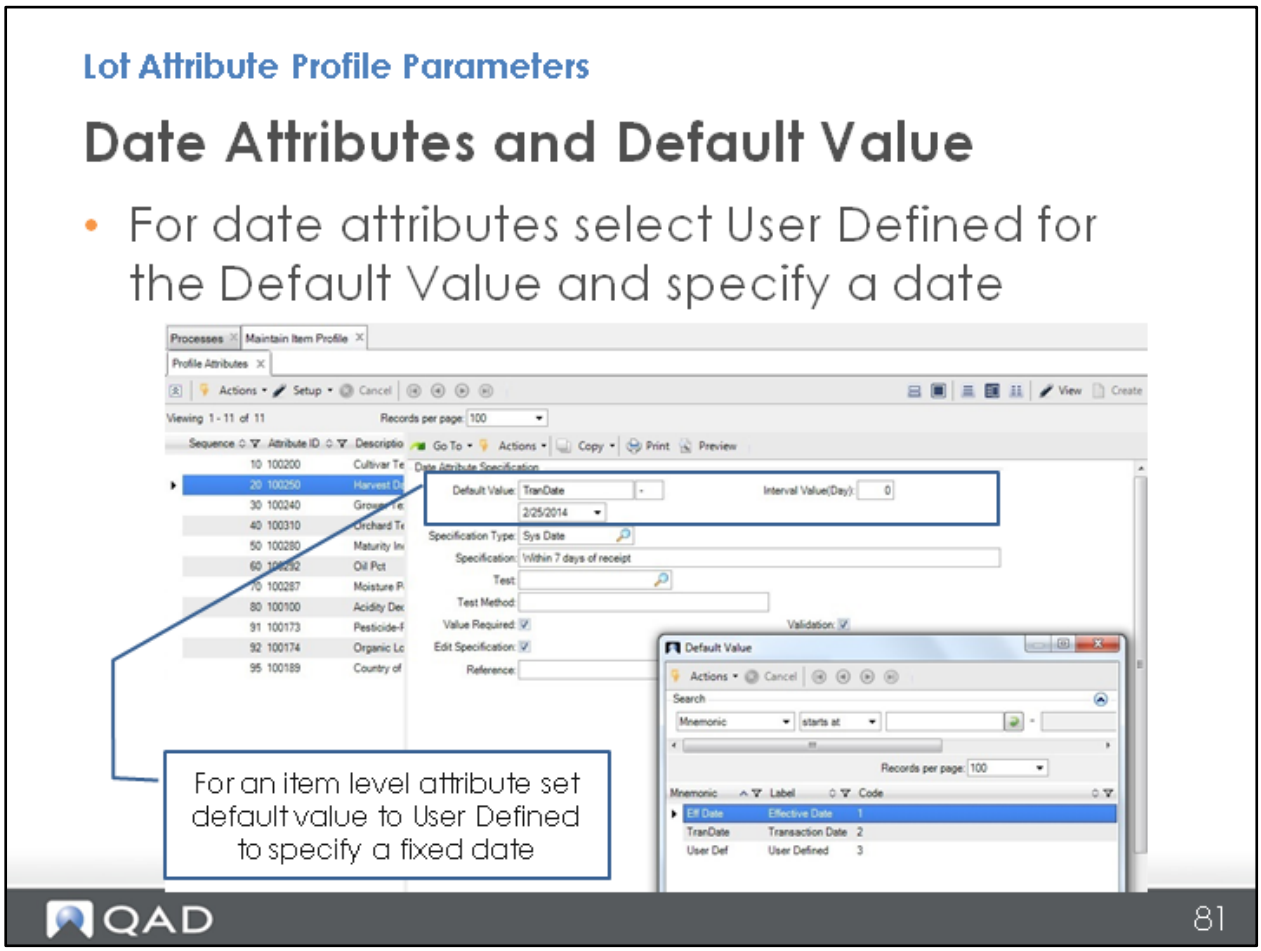
Nominal Value and Specification



The specification determines the conforming value of an attribute. When setting the specification, the following fields are available.

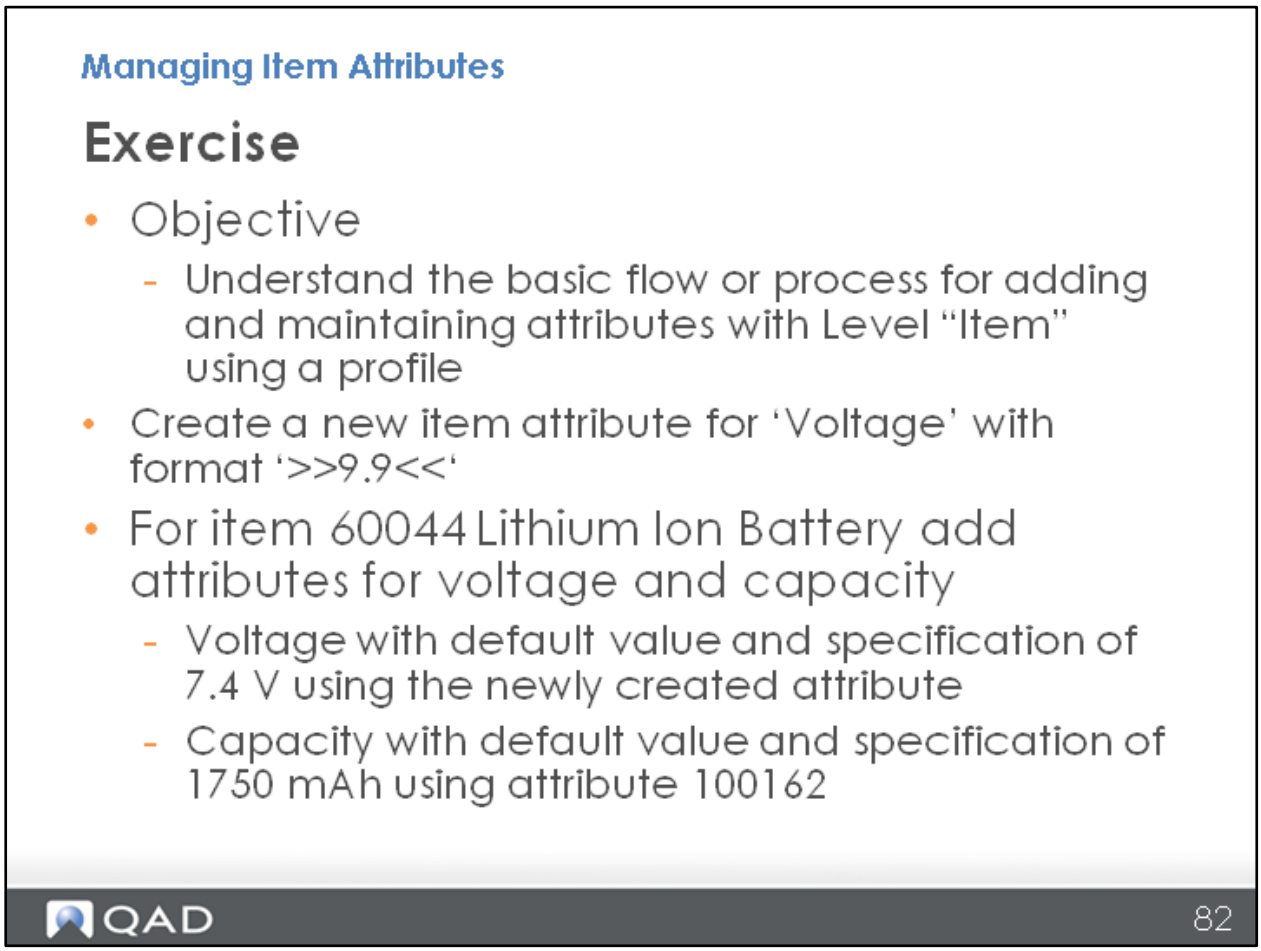
- **Default Value**. The value which the system suggests while users enter the attribute.
- **Measurement**. The unit of measure which the attribute uses.
- **Specification**. A short description of what the specification measures.
- **Test**. If you are not using Quality Control for this attribute, this determines what test method is used.
- **Test Method.** What method is used for the test. This appears on Certificates of Analysis.
- **Value Required.** Whether a value is required for this attribute.
- **Validation**. Whether this attribute checks for conformance to the specification.
- **Edit Specification**. This field addresses Layers, a more advanced function. For the moment, you do not need to work with this field.
- **Reference**. Information which helps users of the system find information on the attribute.

Date Attributes and Default Value



For an item level date attribute select User Defined for the Default Value and specify a date.

Exercise



'Item Attributes' browse to create an attribute for 'Voltage'

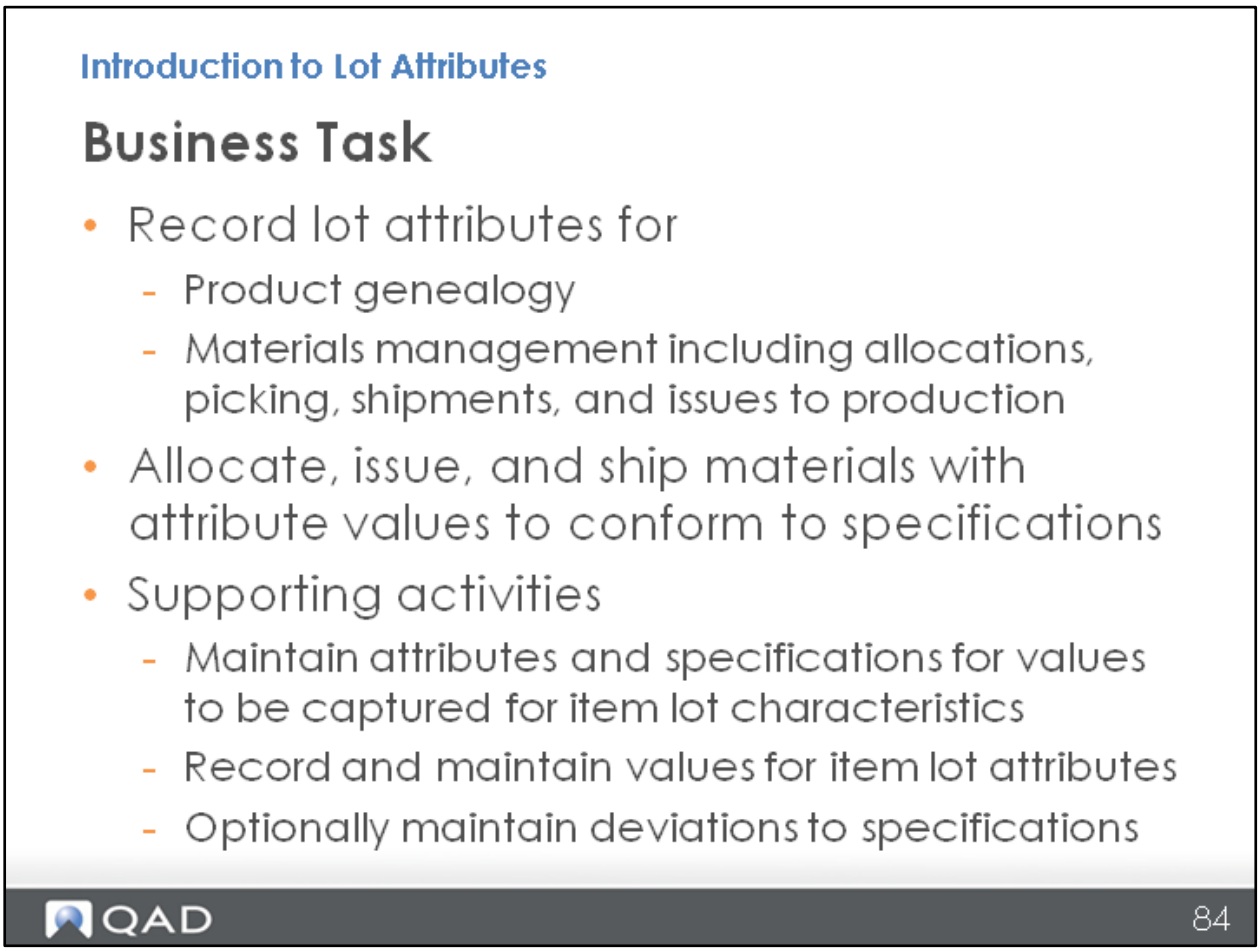
'Maintain Item Profile' to add attributes for 60044

CHAPTER 5

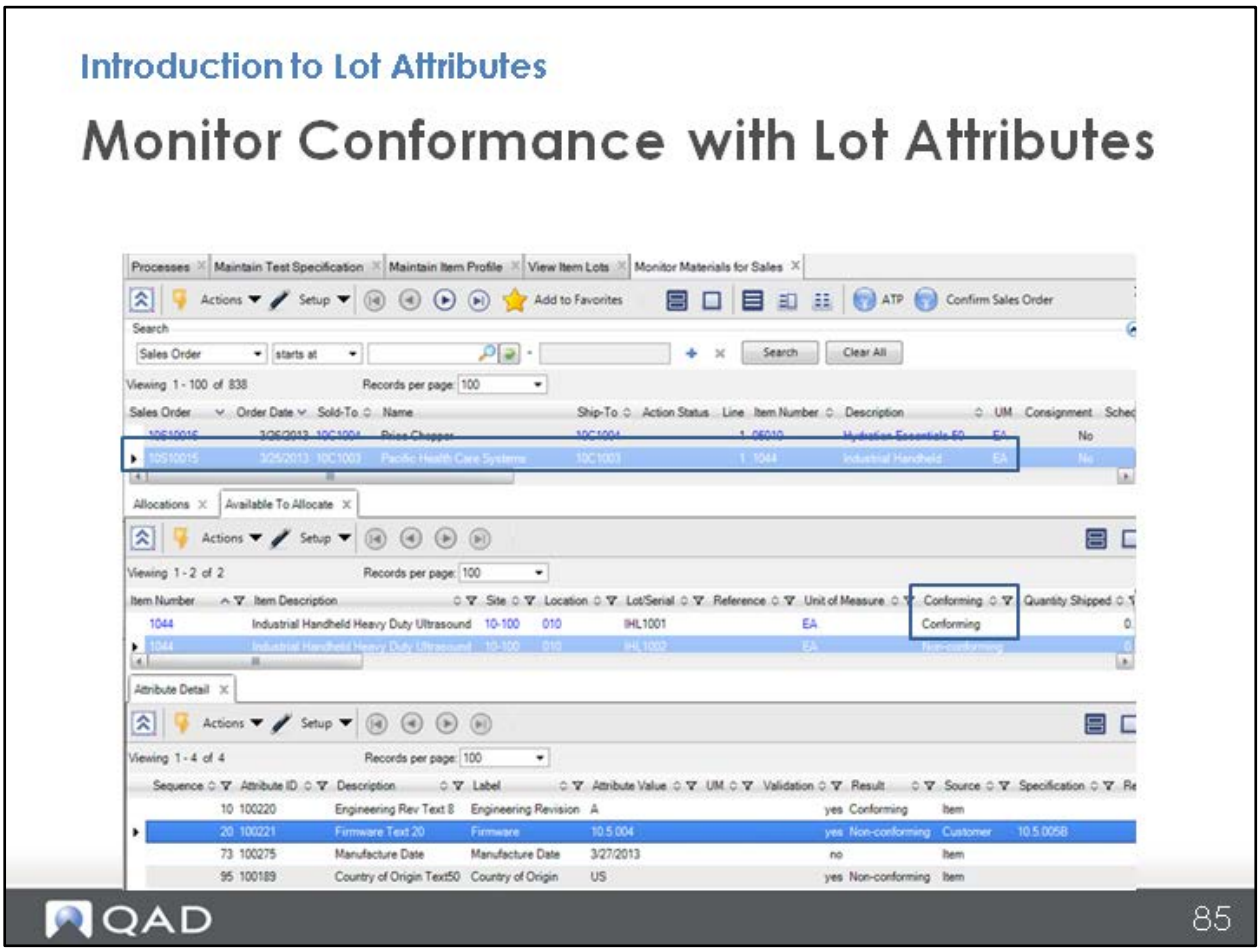
Lot Attribute Orders

Introduction to Lot Attributes

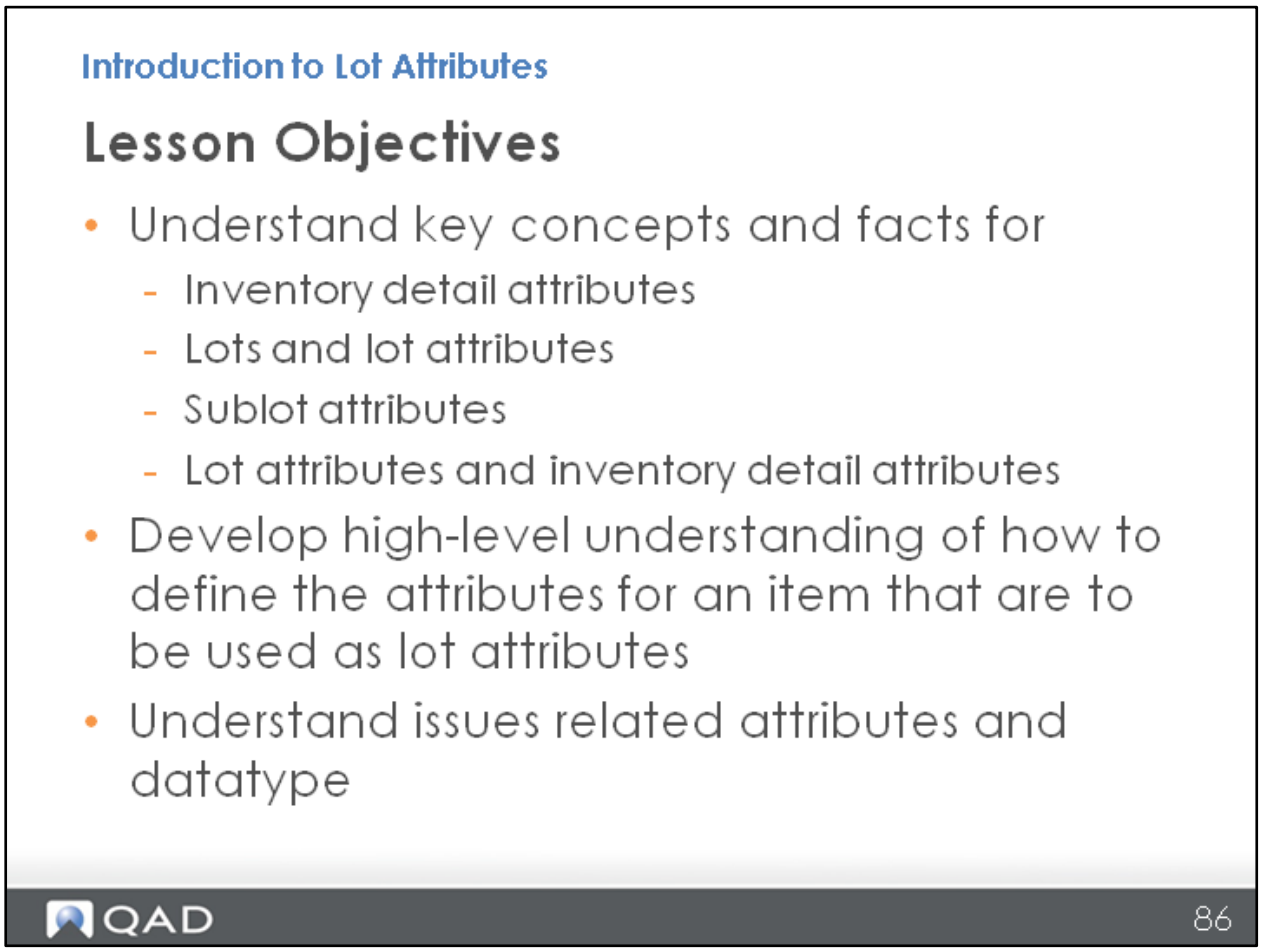
Business Task



Monitor Conformance with Lot Attributes



Lesson Objectives



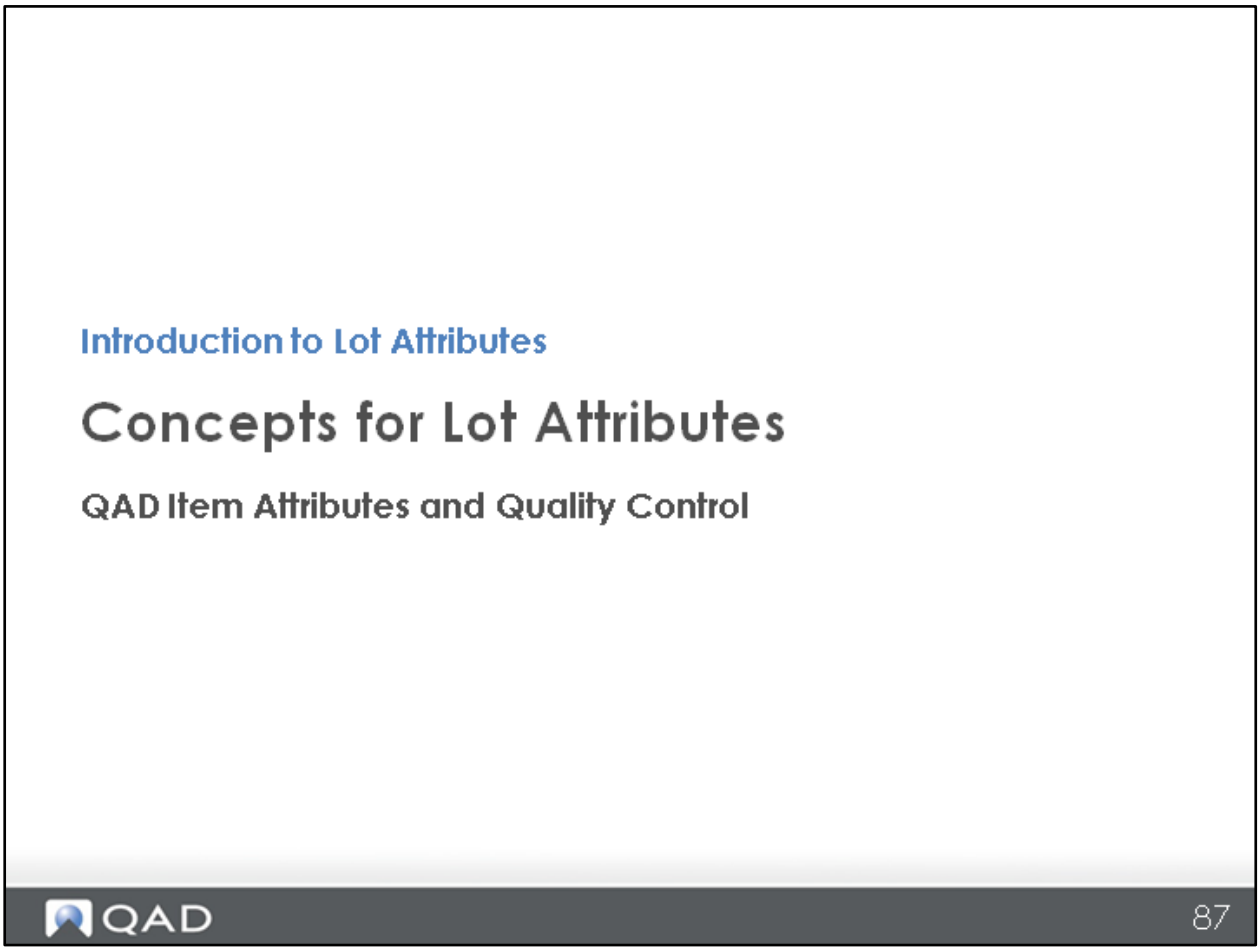
This section of training covers how QAD EE controls lot attributes.

By the end of this training, you will be familiar with the key concepts that explain and enable lot attribute control within QAD EE.

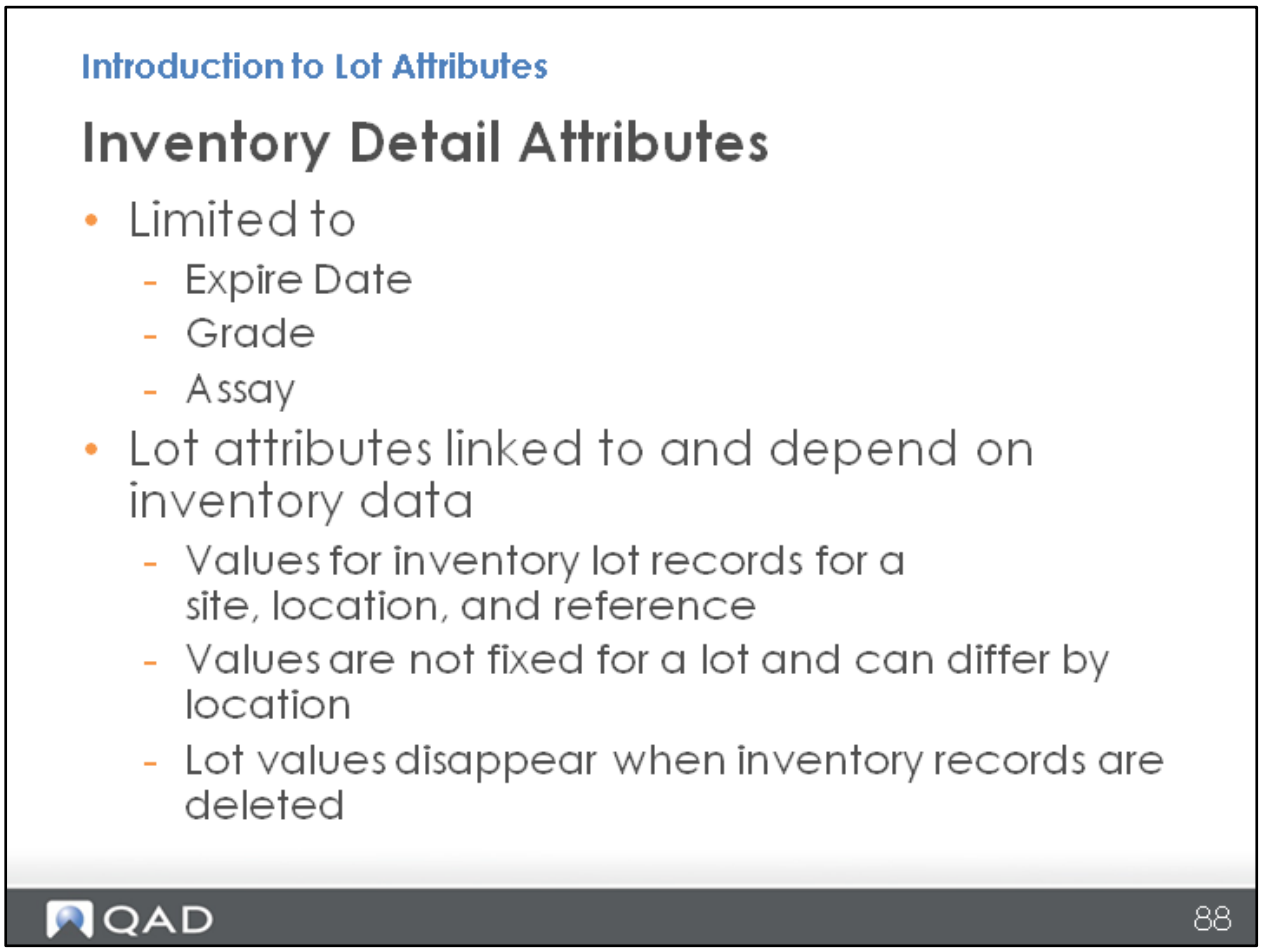
Also, you will understand sublots, and the function they perform within the system.

Then, you will cover how lot attributes differ from inventory detail attributes and how the two interact. Finally, you will cover the actual process of entering values for lot attributes.

Concepts for Lot Attributes



Inventory Detail Attributes

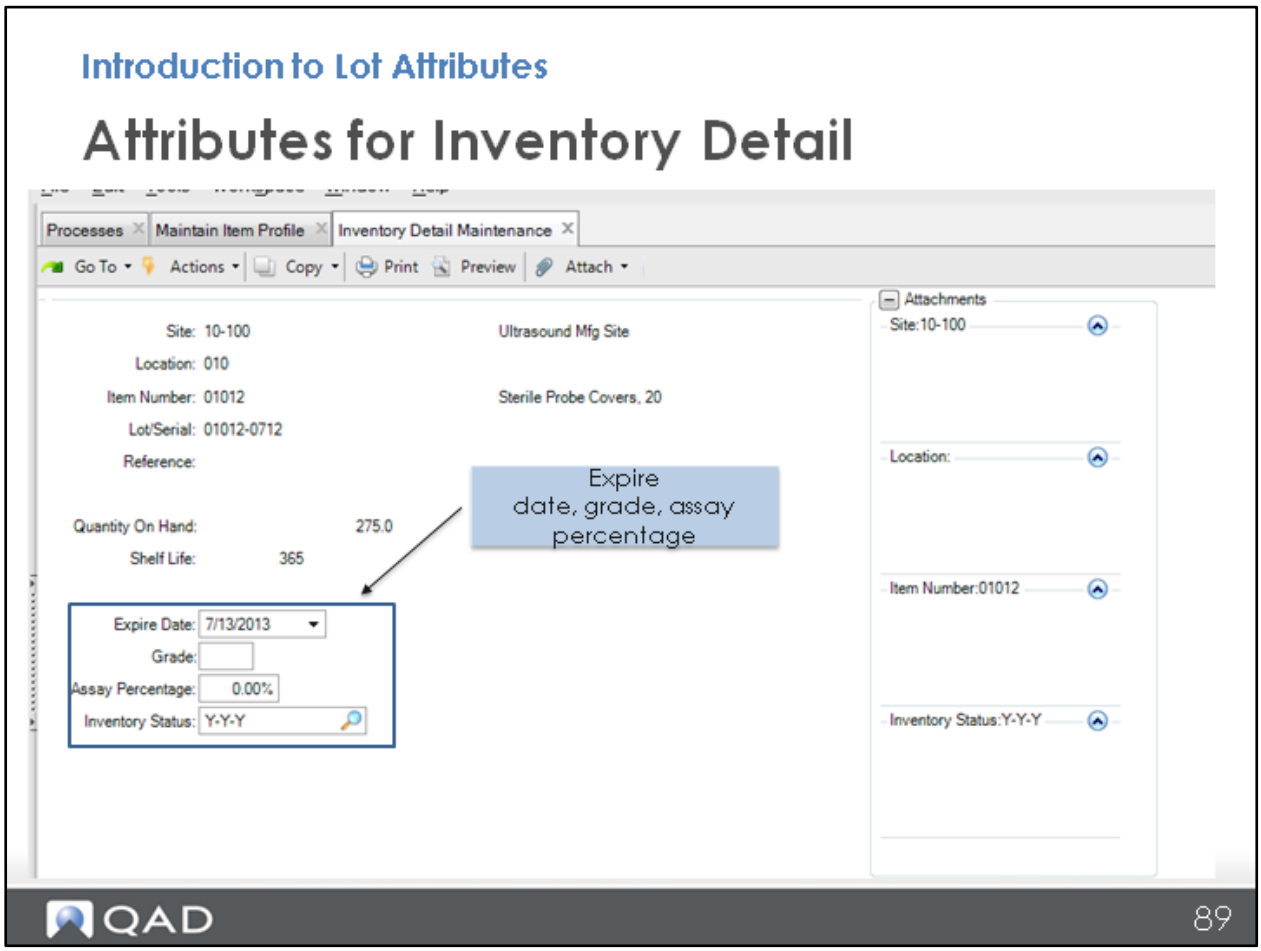


Only cover expiration dates, grade, and assay.

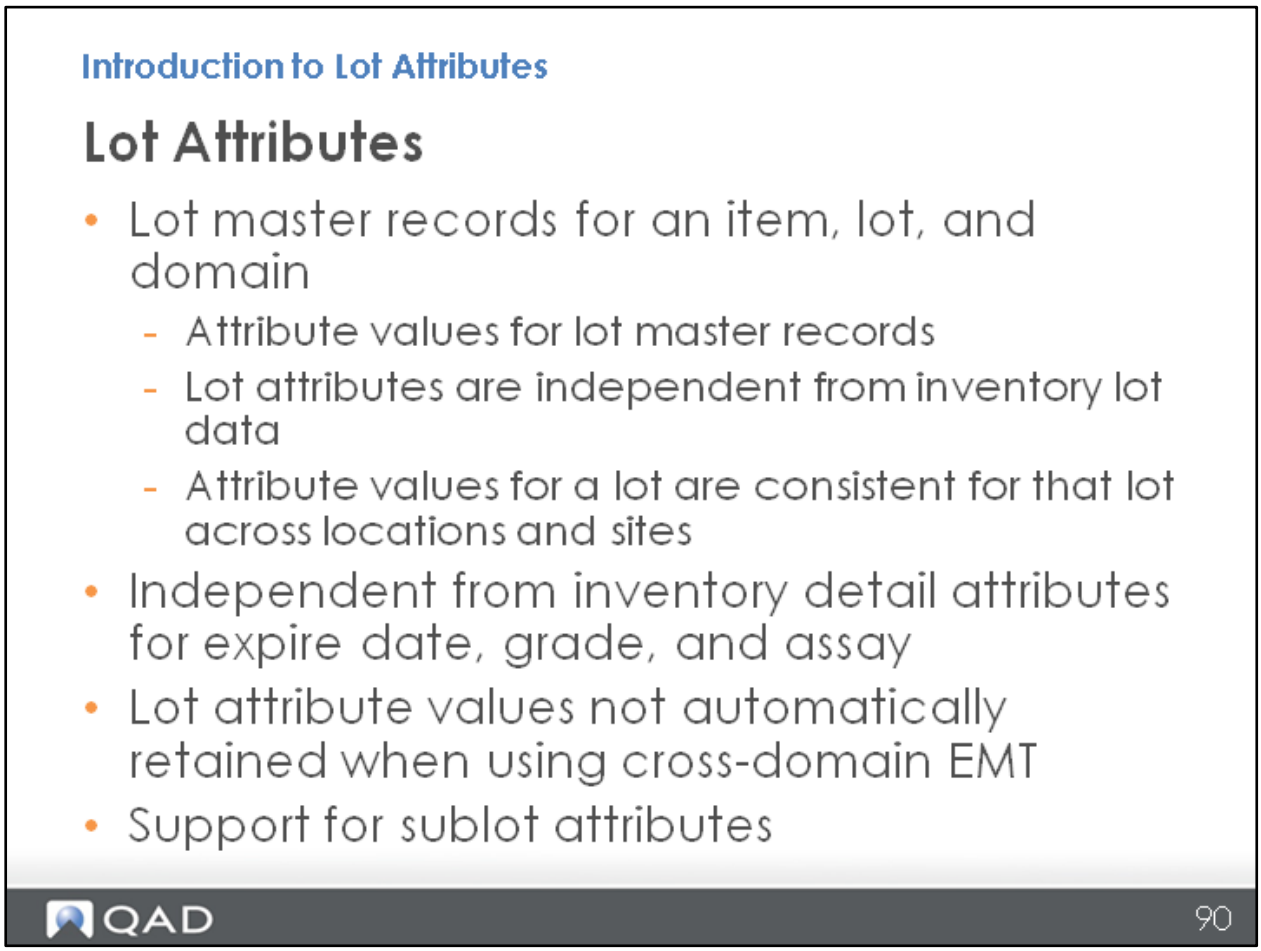
Although item detail attributes are separate from most lot attributes, they are in fact a subtype of lot attributes with a specific purpose. Also known as inventory detail or regulatoy attributes, they cover lot records with specific sites, locations, or reference points. They can differ by location, even when part of a single lot.

When inventory records are deleted, the lot values for the attributes are deleted.

Attributes for Inventory Detail



Lot Attributes



Lot attributes are the attribute values which attach to lot master records.

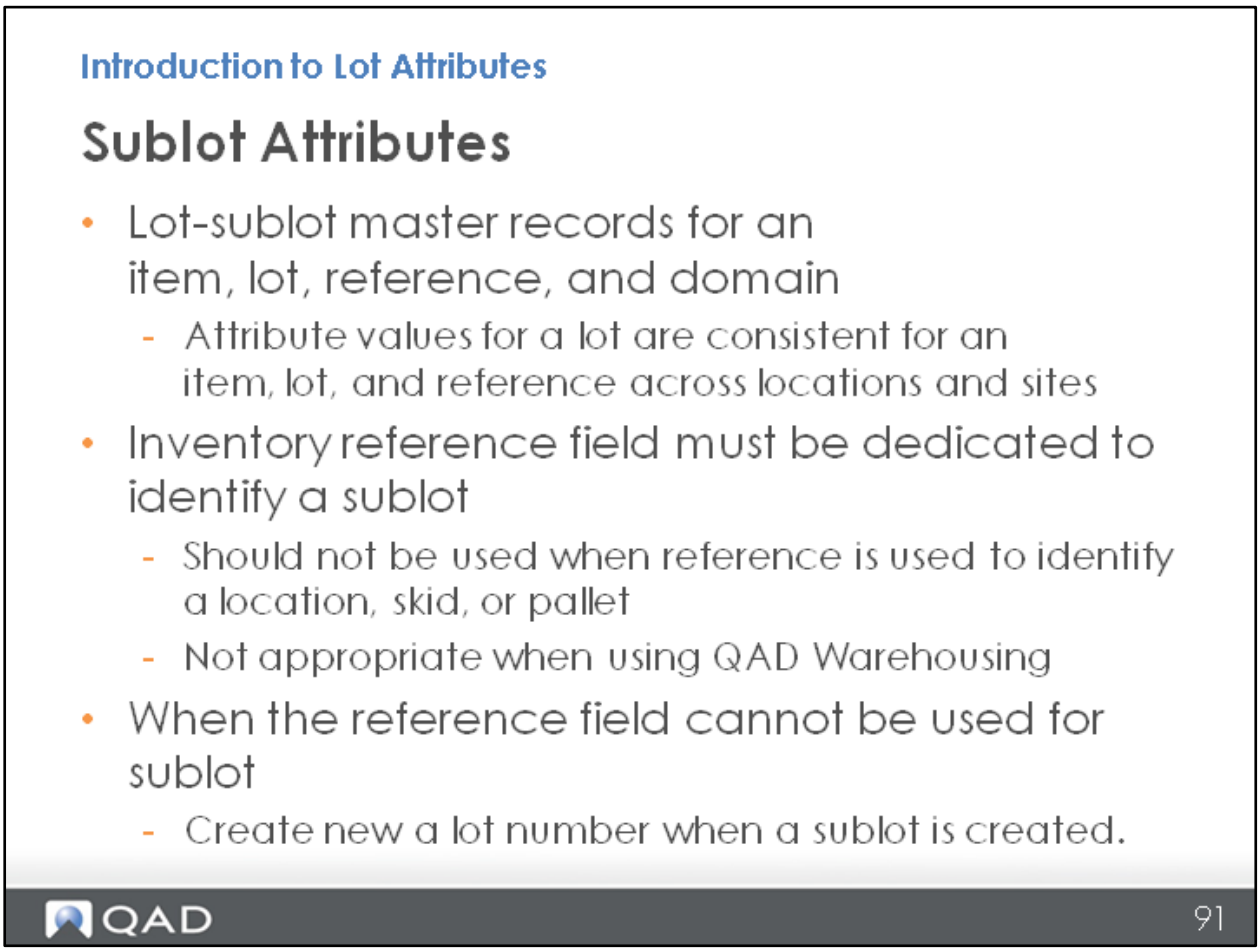
They are independent from the data in the inventory lot. They instead apply to all locations and sites connected to the lot master record within a domain.

Lot attribute values are not automatically retained when using cross-domain EMT

Lot attributes support the use of sublots, which can have attached sublot attributes.

Lot and sublot attributes function independently from inventory detail attributes.

Sublot Attributes



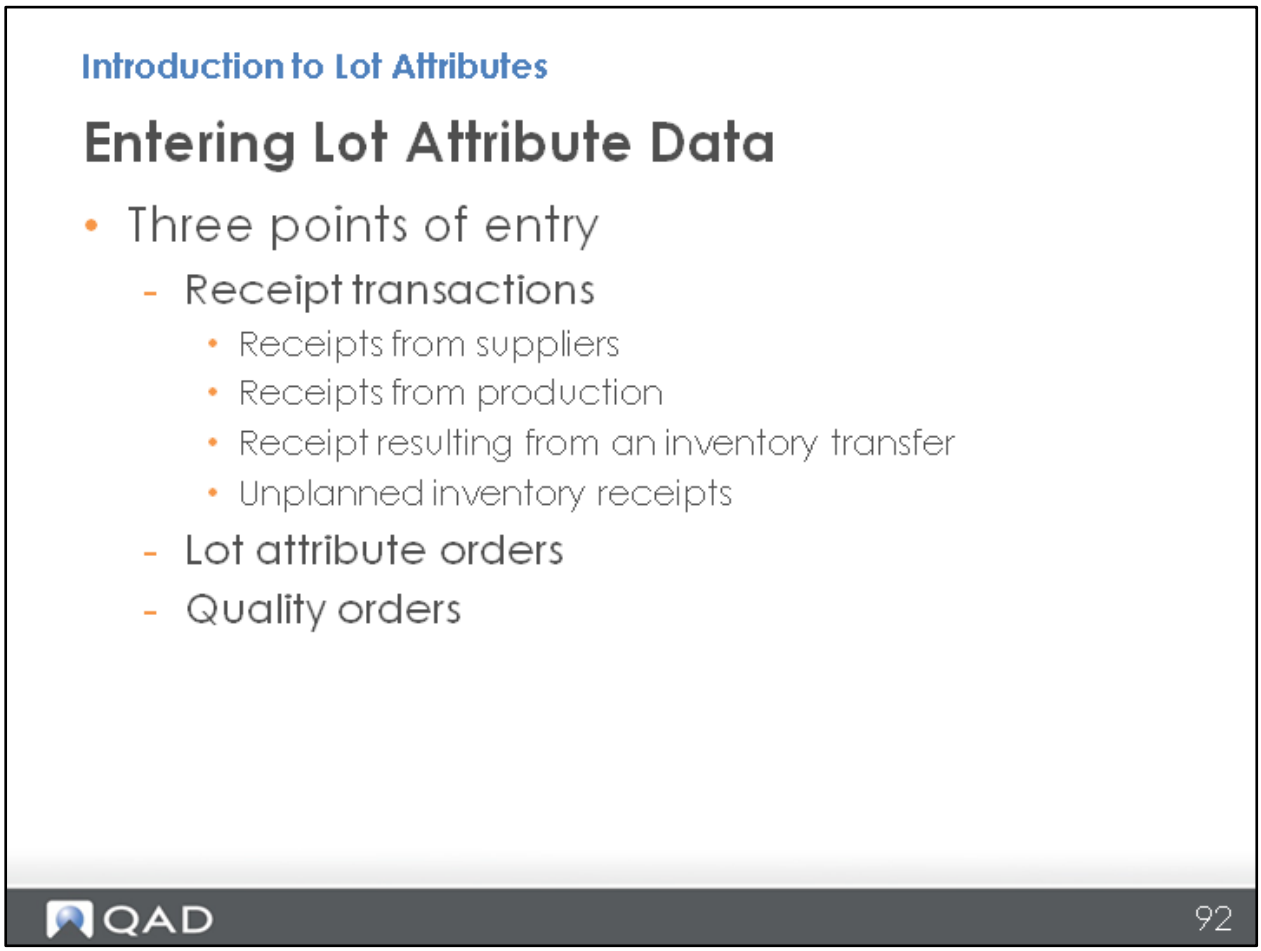
Sublot attributes, like lot attributes, stay consistent across the different items, lots, locations and sites that the sublot governs.

Sublots are appropriate to use when a the inventory reference is dedicated. Locations, skids, and pallets are not dedicated, and as such are not appropriate places to use sublots. They are also not appropriate for use with QAD warehousing.

The basic limitation is that there is a single reference field for inventory detail. There is not an additional field that can be used independently for sublot.

Implementation when the reference field cannot be used for sublot will require that a new lot number be created when a sublot is created.

Entering Lot Attribute Data



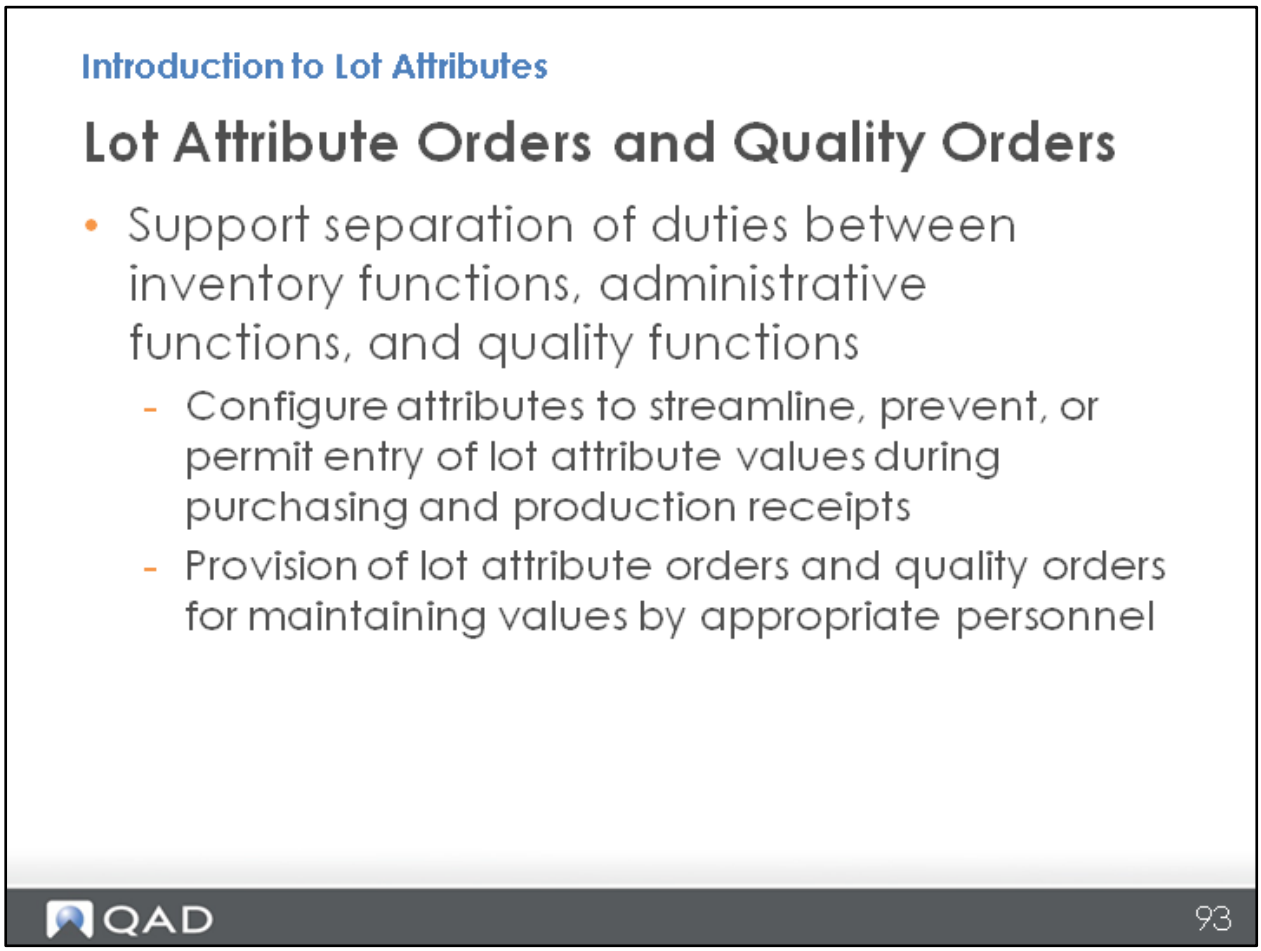
You can enter data for lot attributes at three points.

First, you have an option to enter values during some receipt transactions. This includes receipts from suppliers on purchase orders, receipts from production on work orders, or receipts from a repetitive schedule.

If you do not enter the values during the receipt itself, you can also enter values directly. Do this on the lot attribute order created by the receipt transaction.

If there is a test specification attached to the item, a quality order attaches to the receipt. You can enter lot attribute values through quality orders.

Lot Attribute Orders and Quality Orders

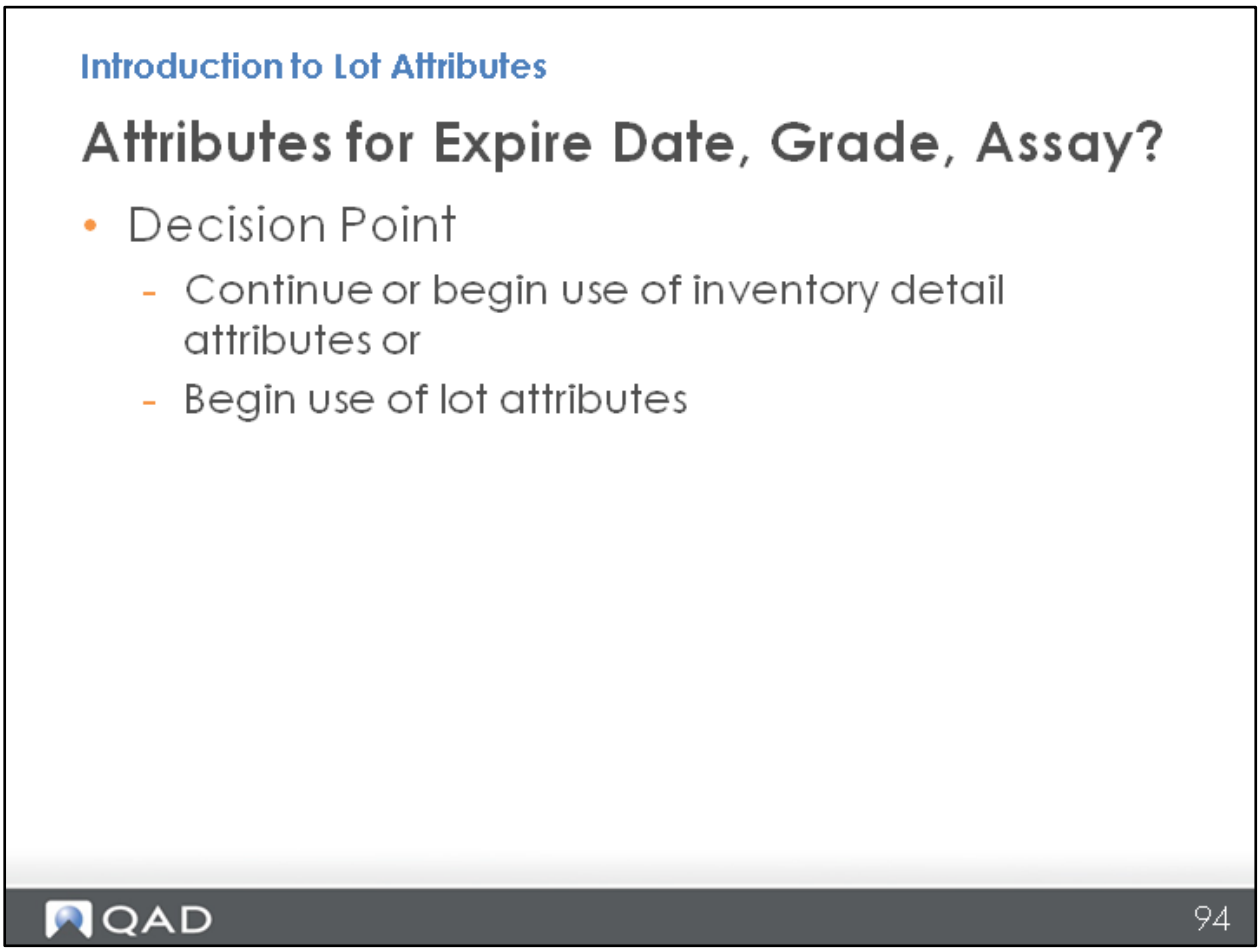


Quality orders are the subset of lot attribute orders which enable quality control.

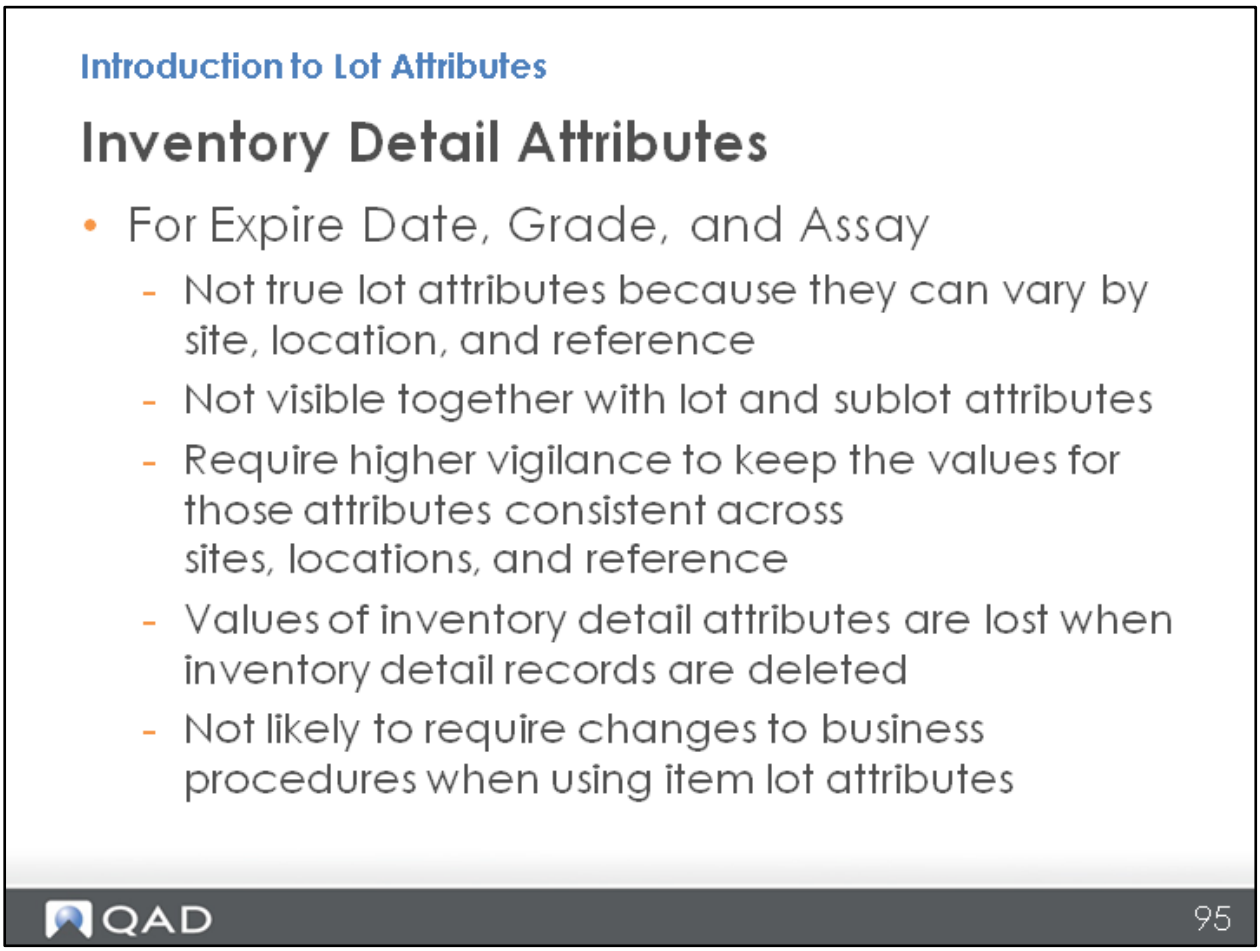
Quality orders are separate from lot attribute orders as a whole because they focus on a specific situation. Quality orders are attached to the testing process. They are not useful for general inventory management or administration.

Users can set up lot attributes and test specifications to control how lot attribute orders and quality orders are created.

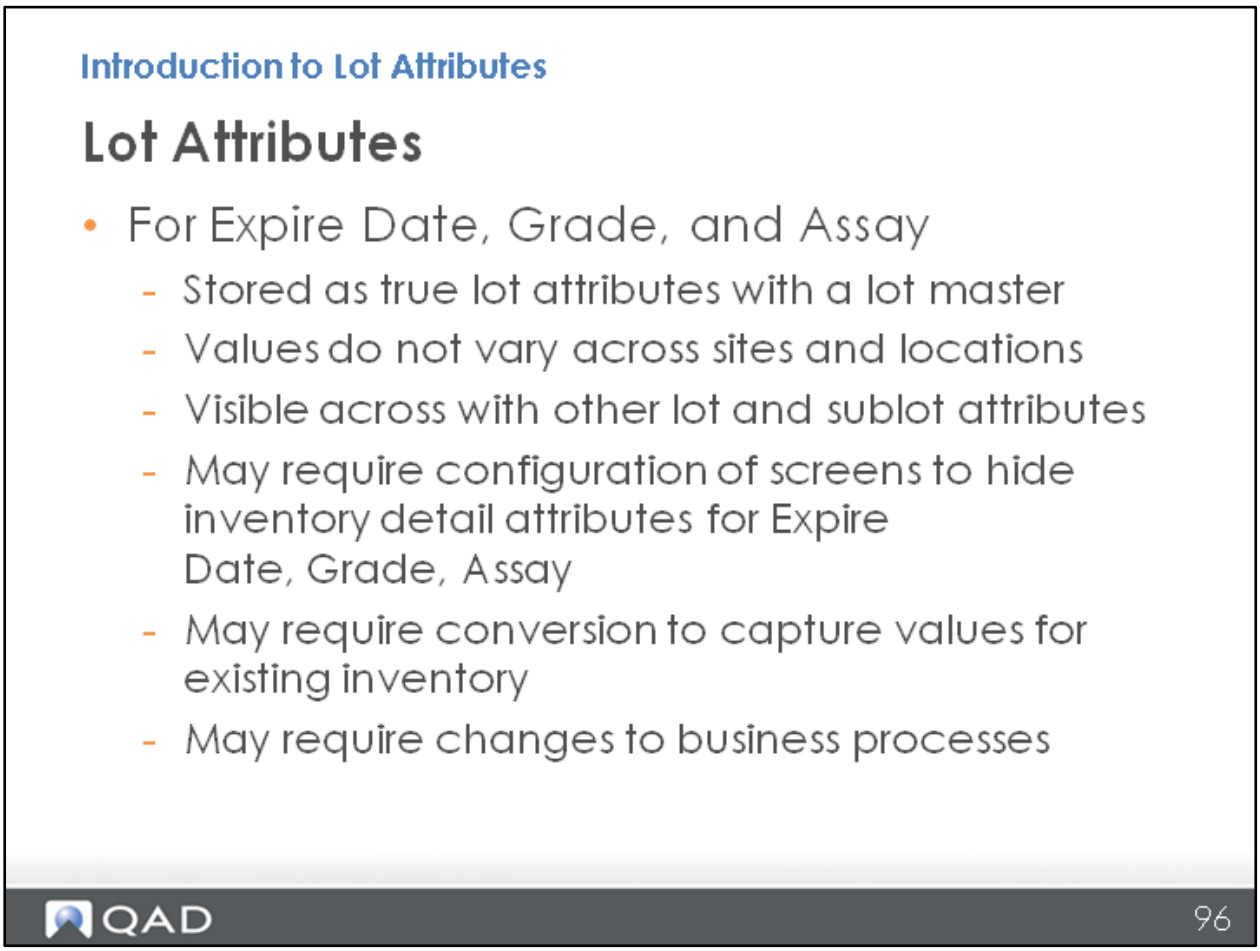
Attributes for Expire Date, Grade, Assay?



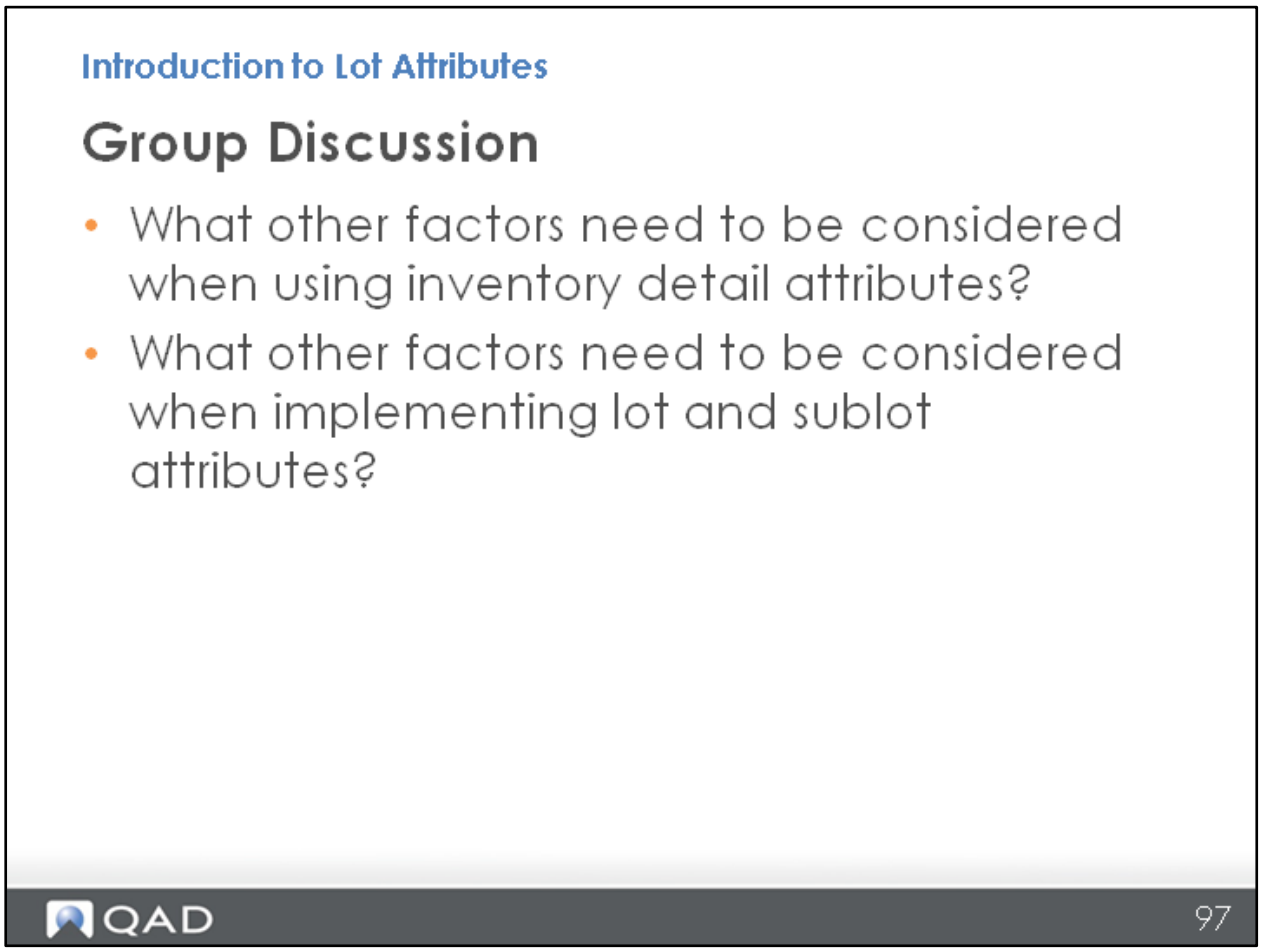
Inventory Detail Attributes



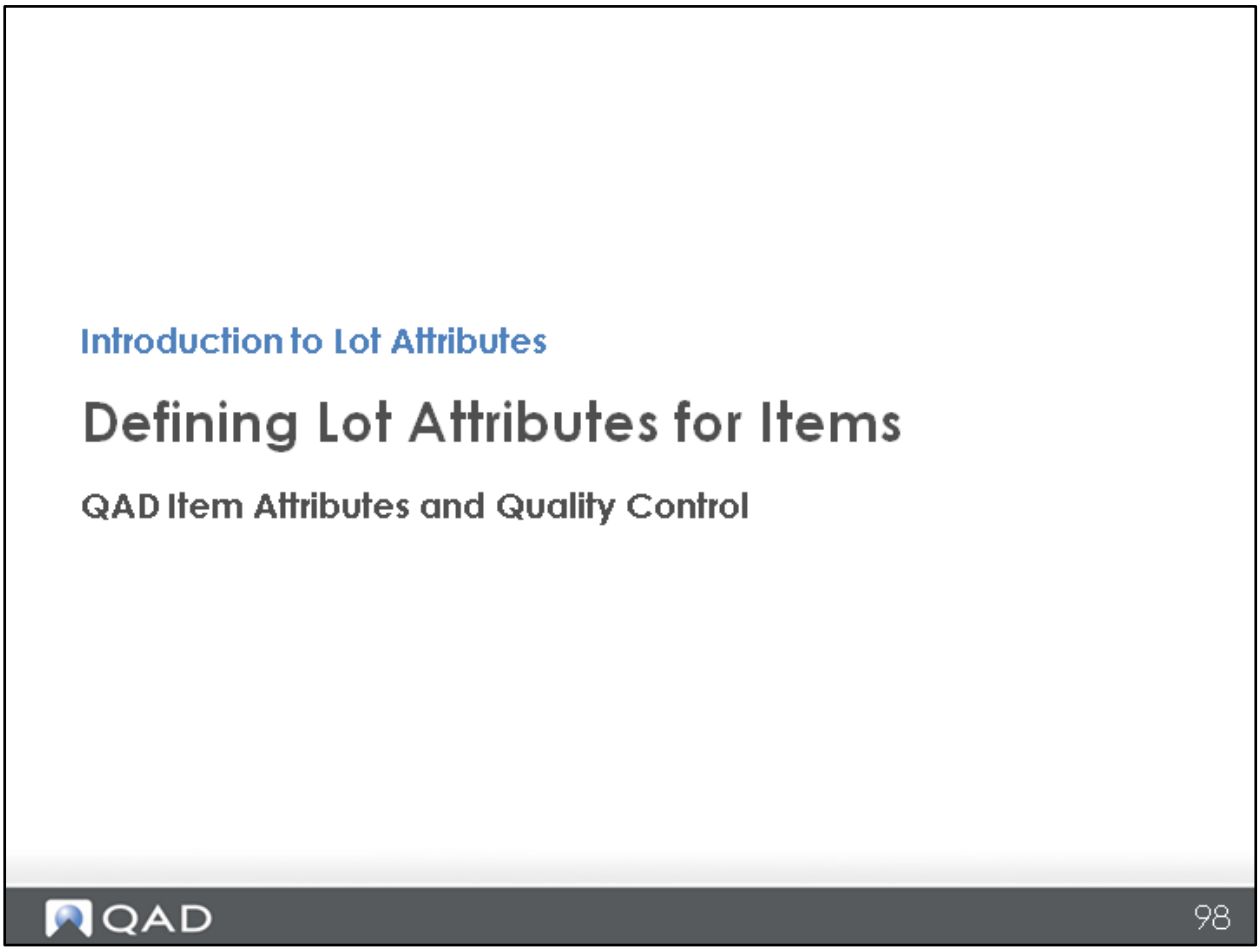
Lot Attributes



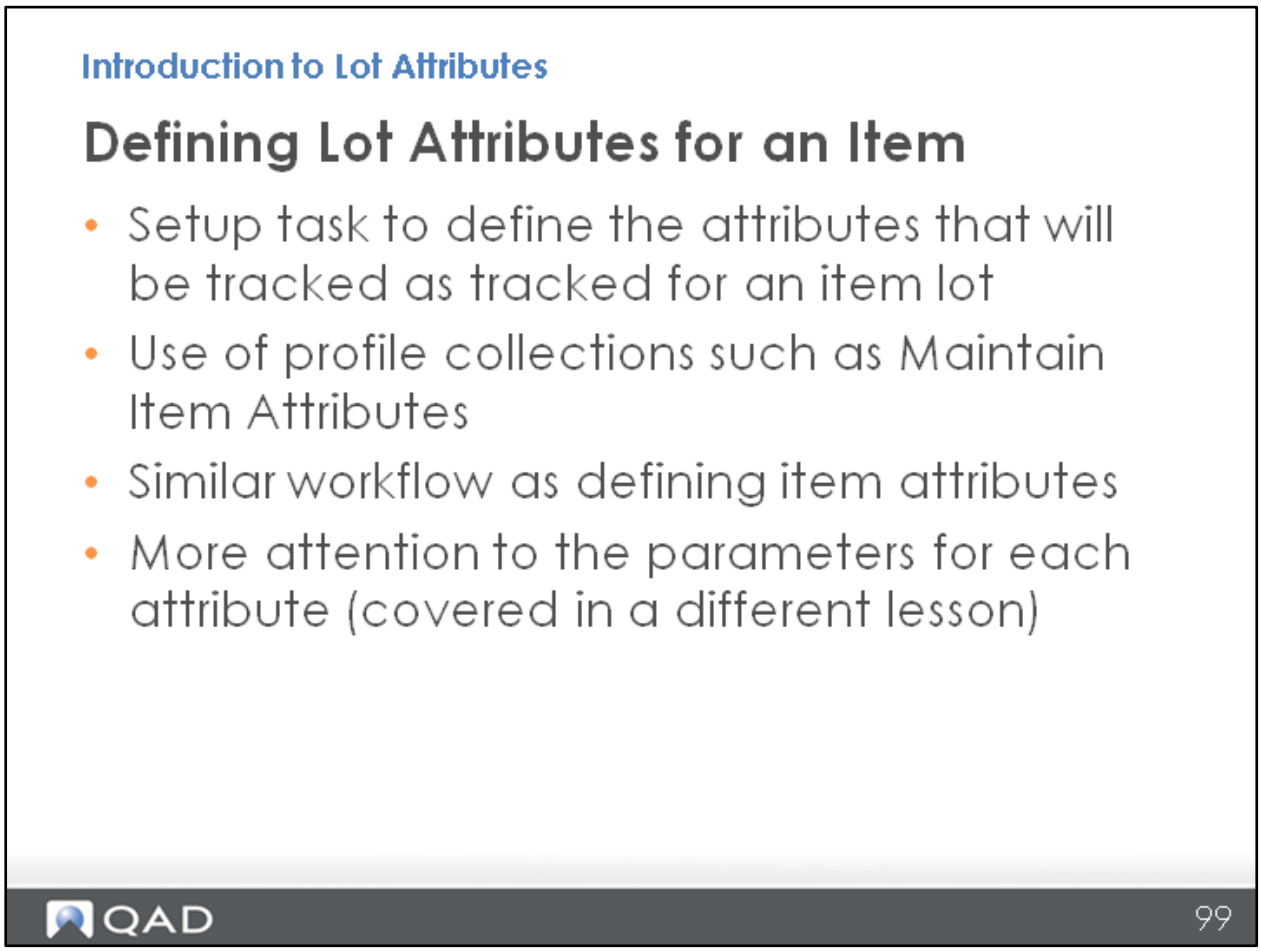
Group Discussion



Defining Lot Attributes for Items



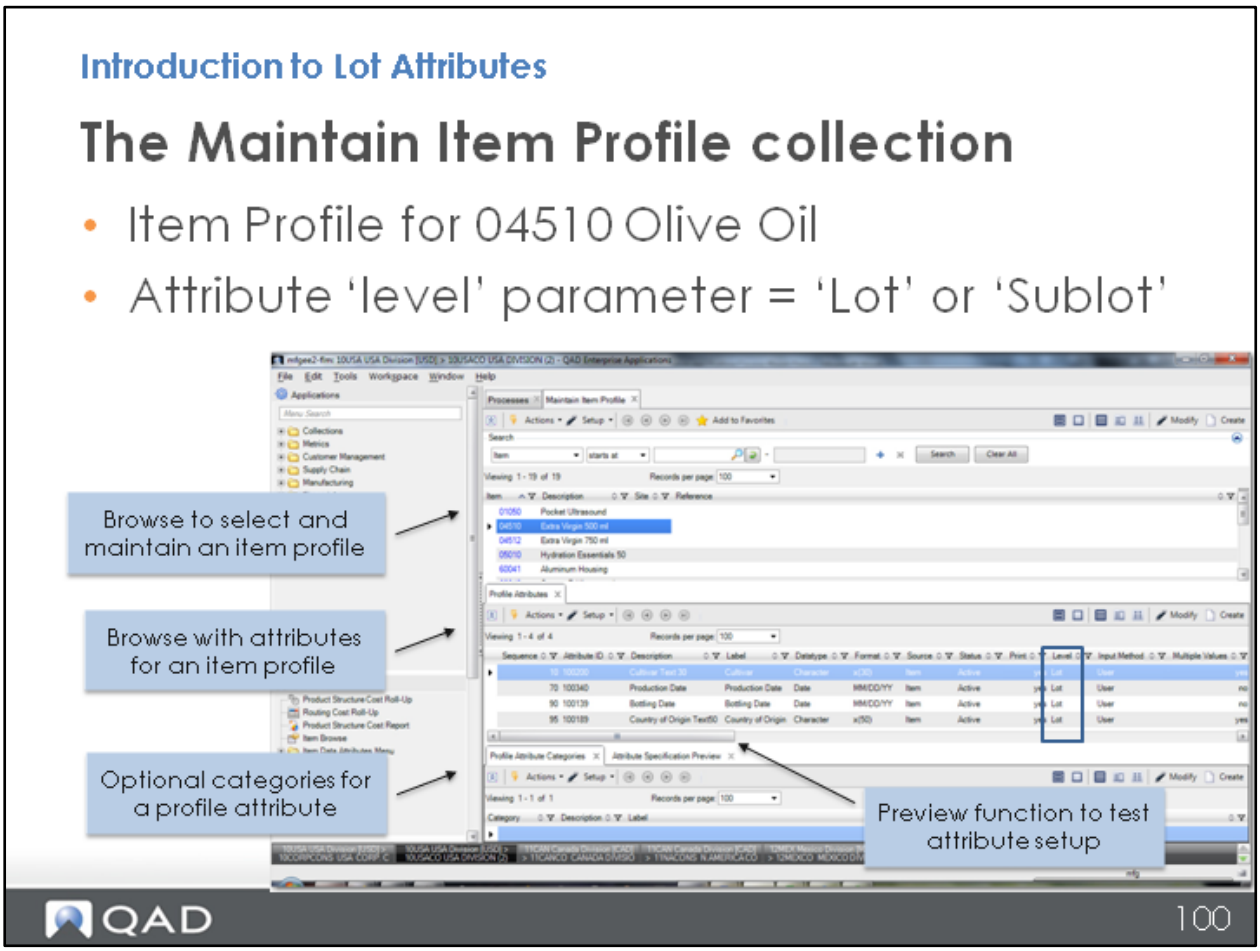
Defining Lot Attributes for an Item



Lot attributes are the attributes which support lot master data and lot-sublot master data.

Associations are defined by profile collections.

The Maintain Item Profile collection

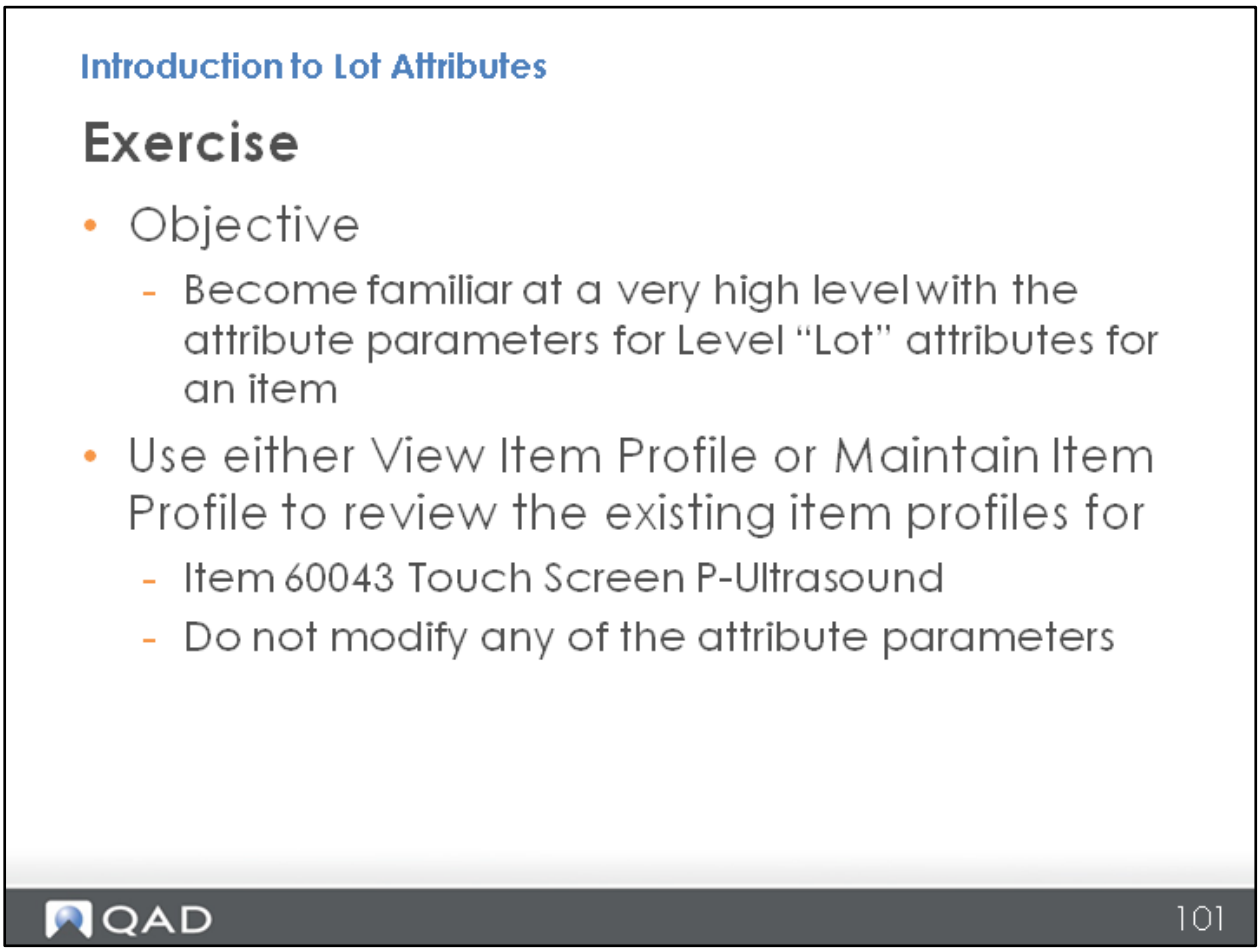


The Maintain Item Profile browse collection allows you to create, modify, and view item profiles.

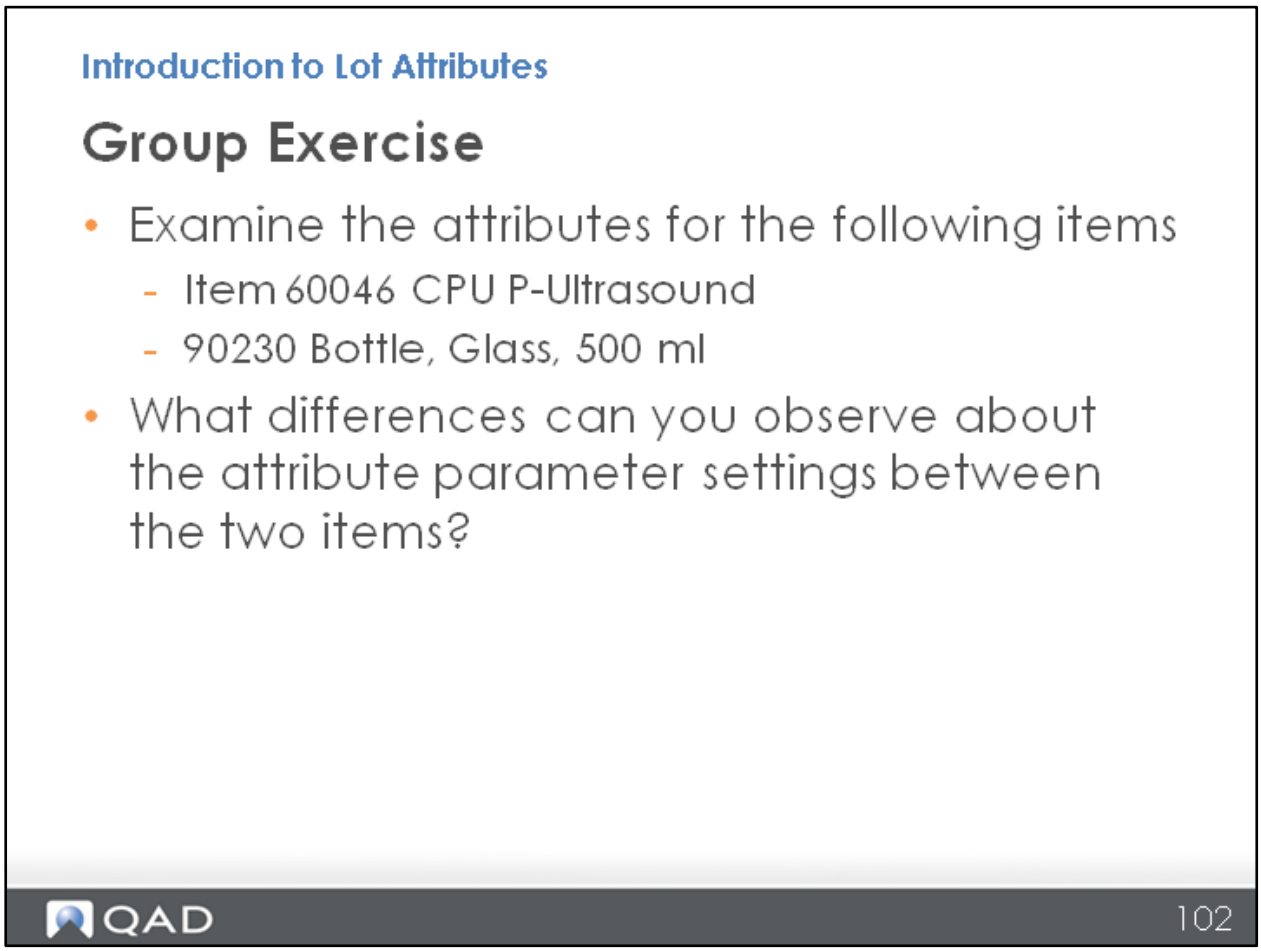
The second level Profile Attributes tab within the browse collection stores information on the attributes associated with each profile.

In the picture above, you can see the profile attributes associated with the selected item profile.

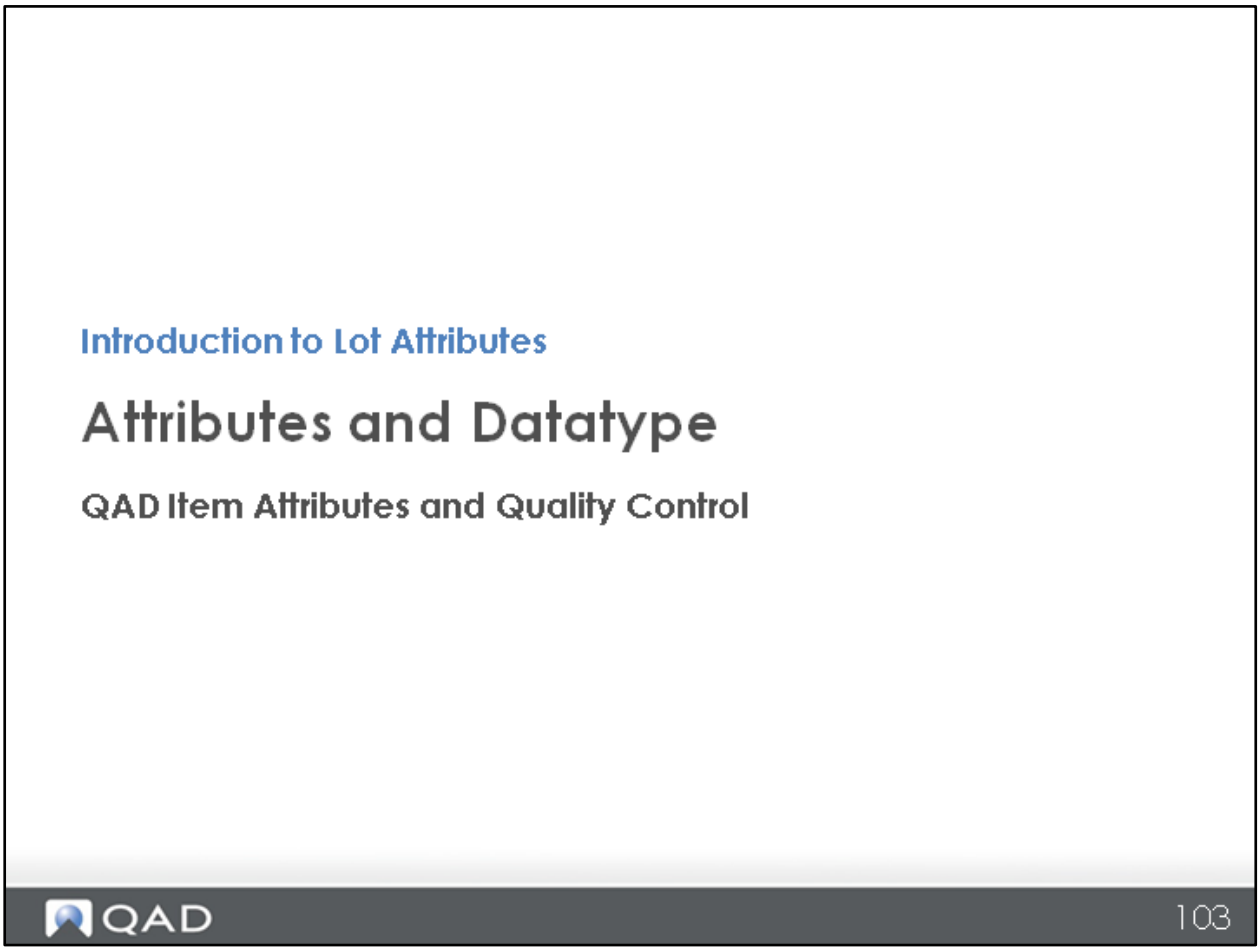
Exercise


Introduction to Lot Attributes
Exercise
Objective
Become familiar at a very high level with the attribute parameters for Level "Lot" attributes for an item
Use either View Item Profile or Maintain Item Profile to review the existing item profiles for
Item 60043 Touch Screen P-Ultrasound
Do not modify any of the attribute parameters
QAD
101

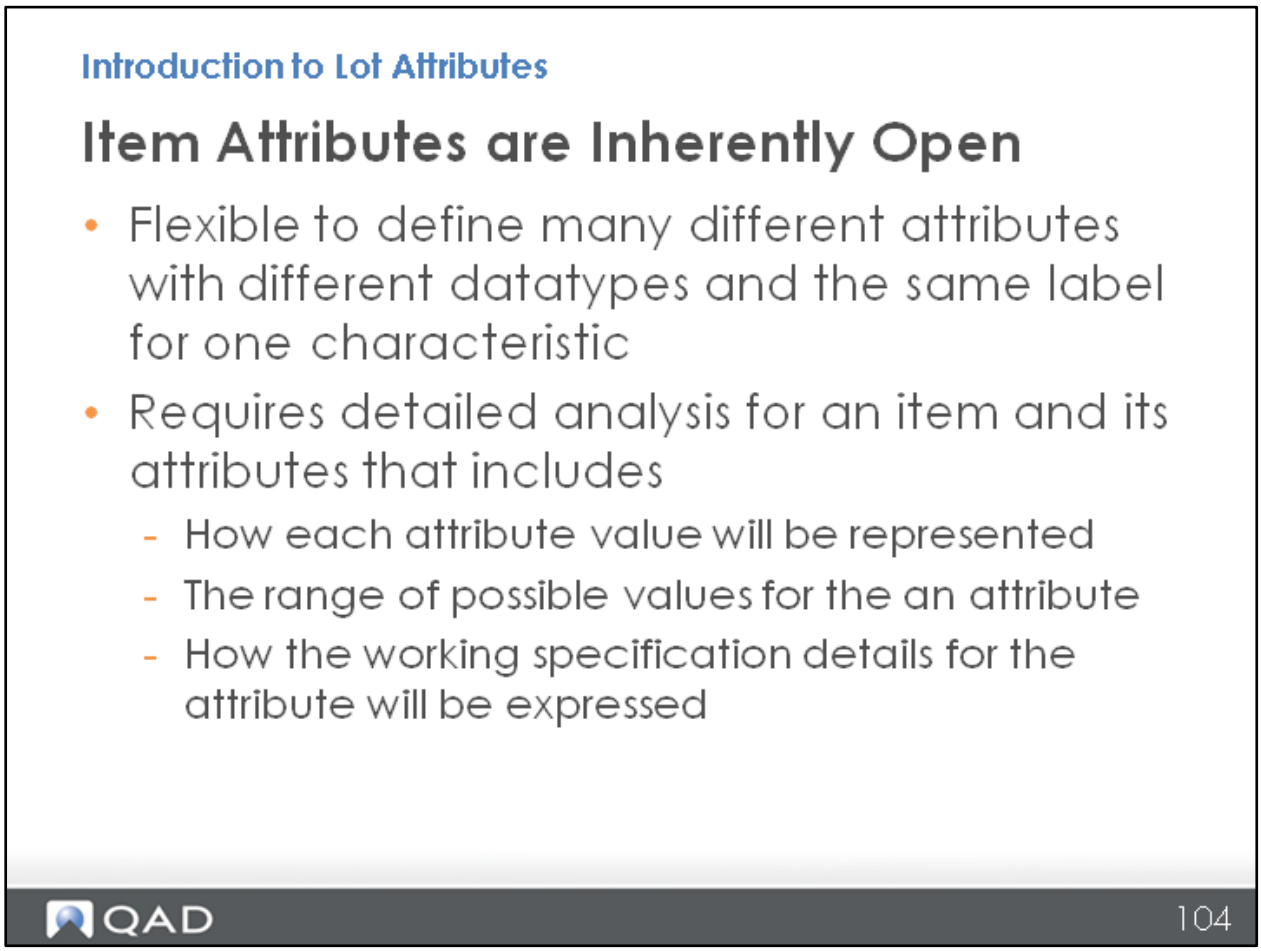
Group Exercise



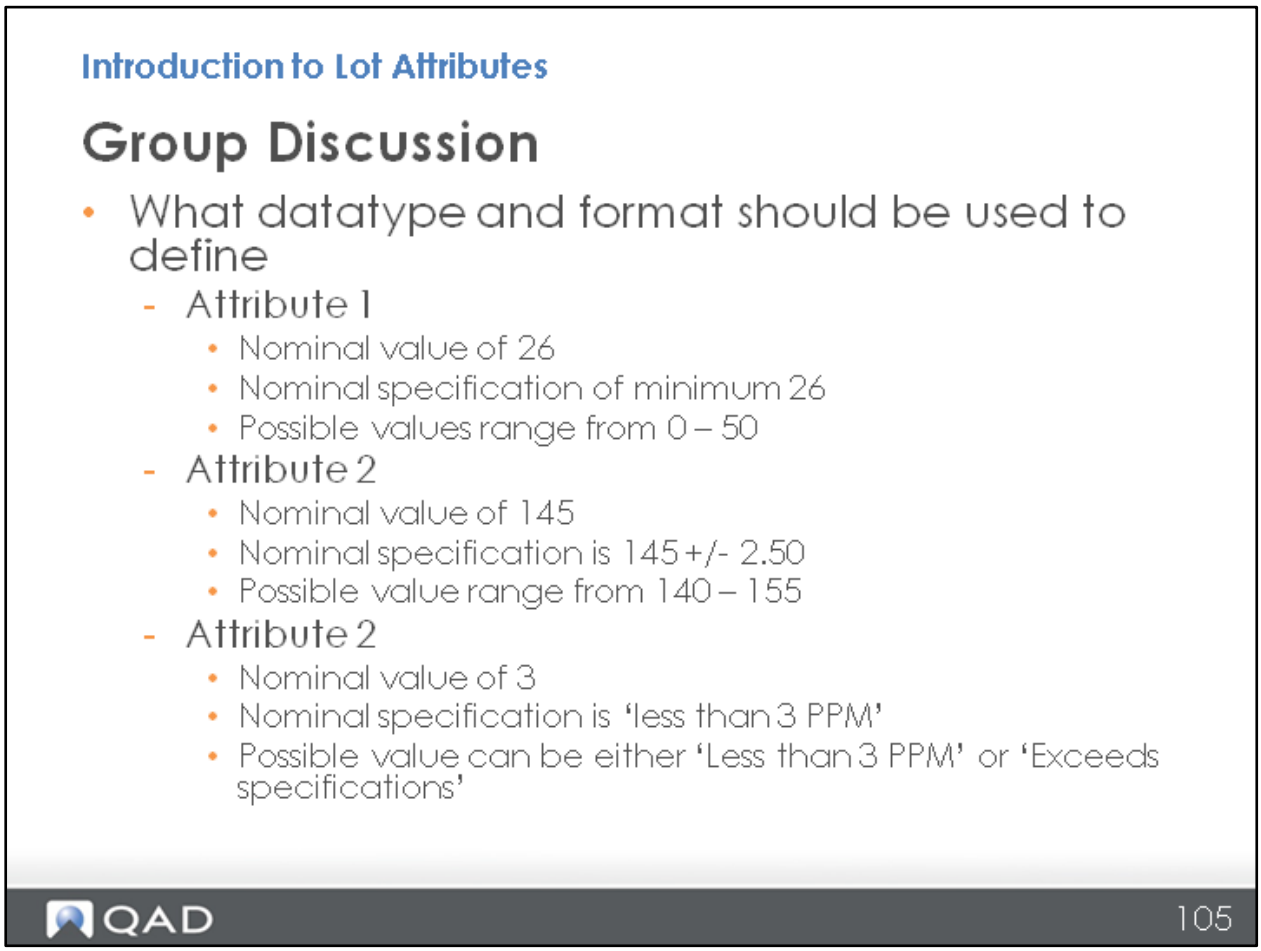
Attributes and Datatype



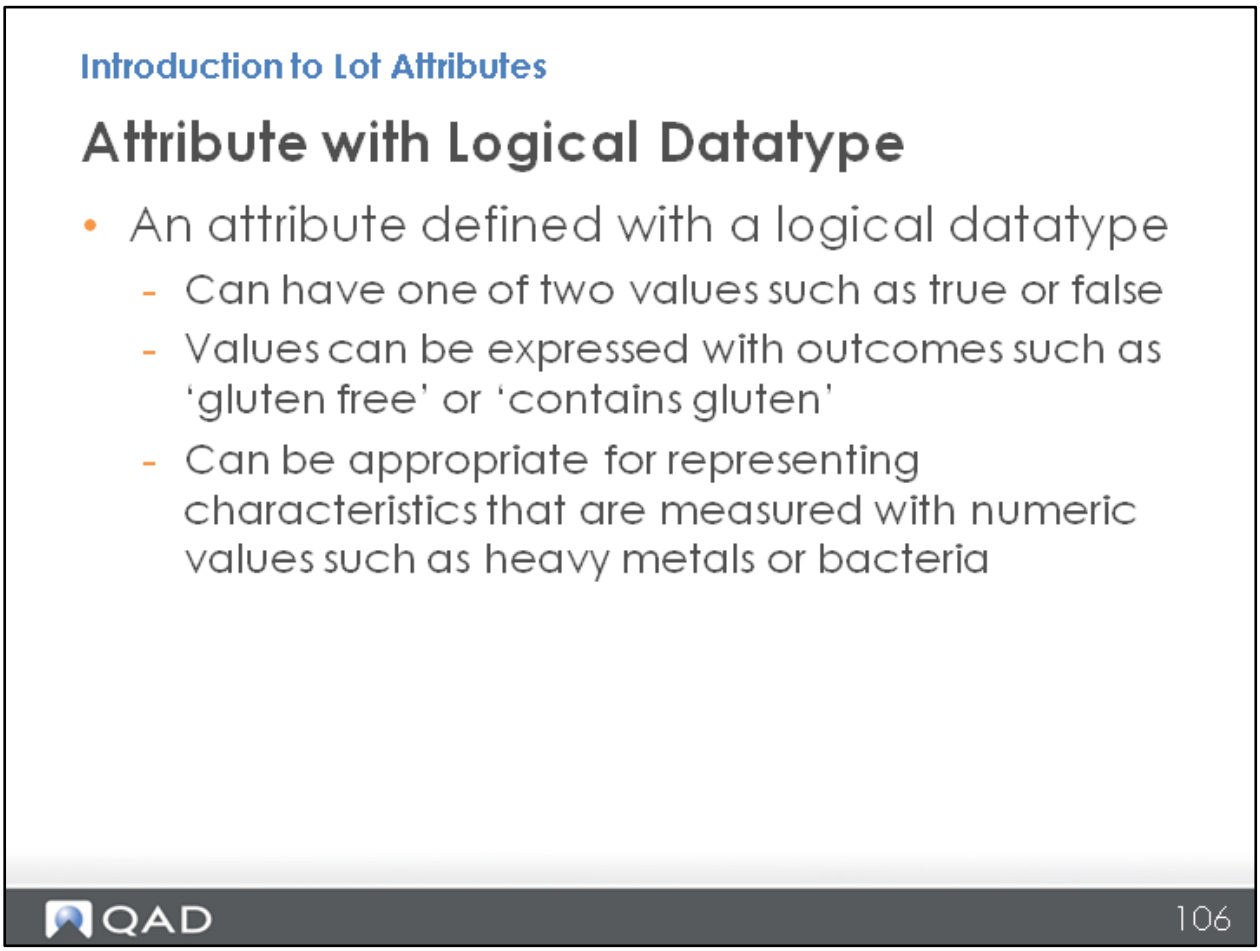
Item Attributes are Inherently Open



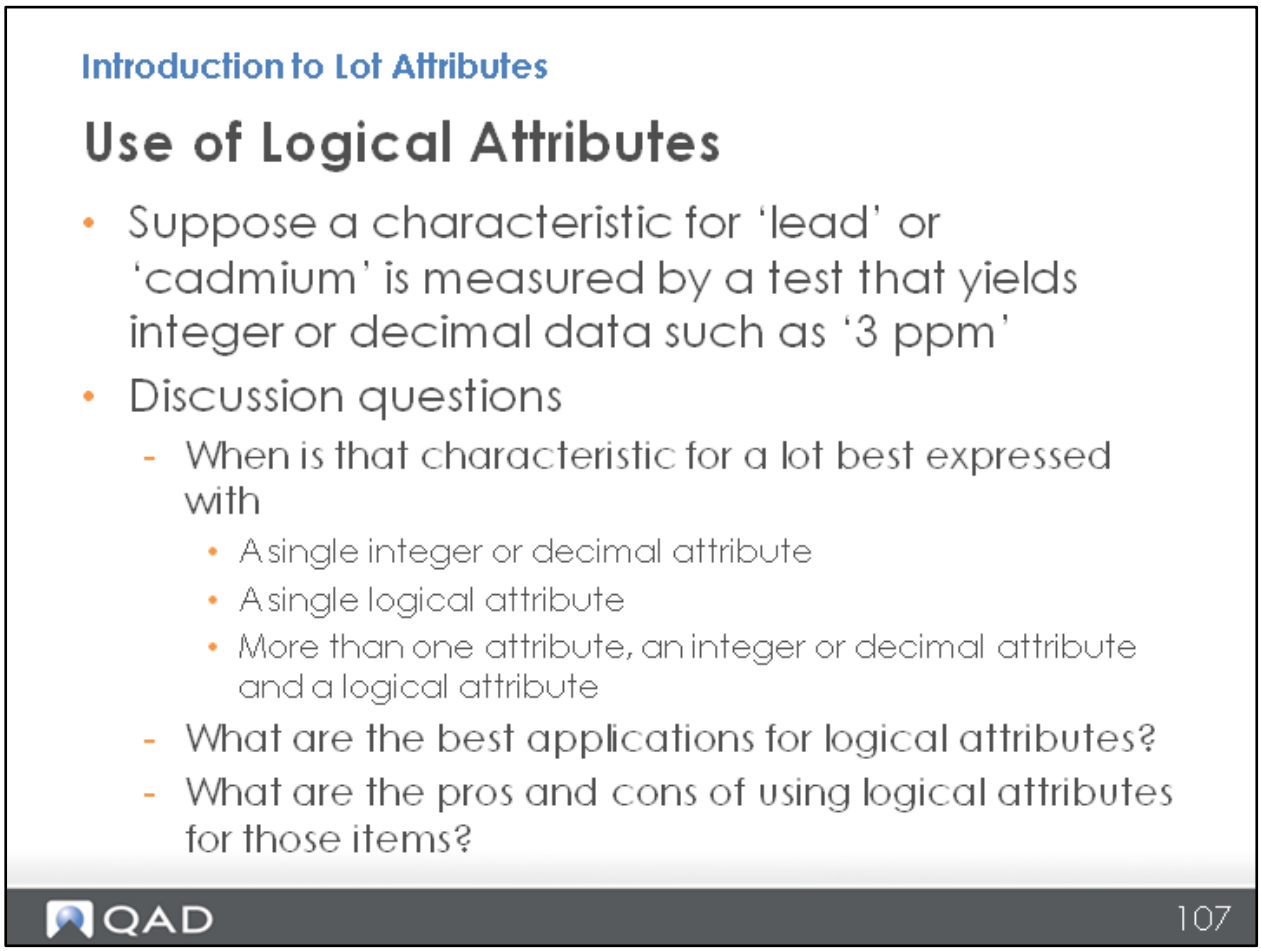
Group Discussion



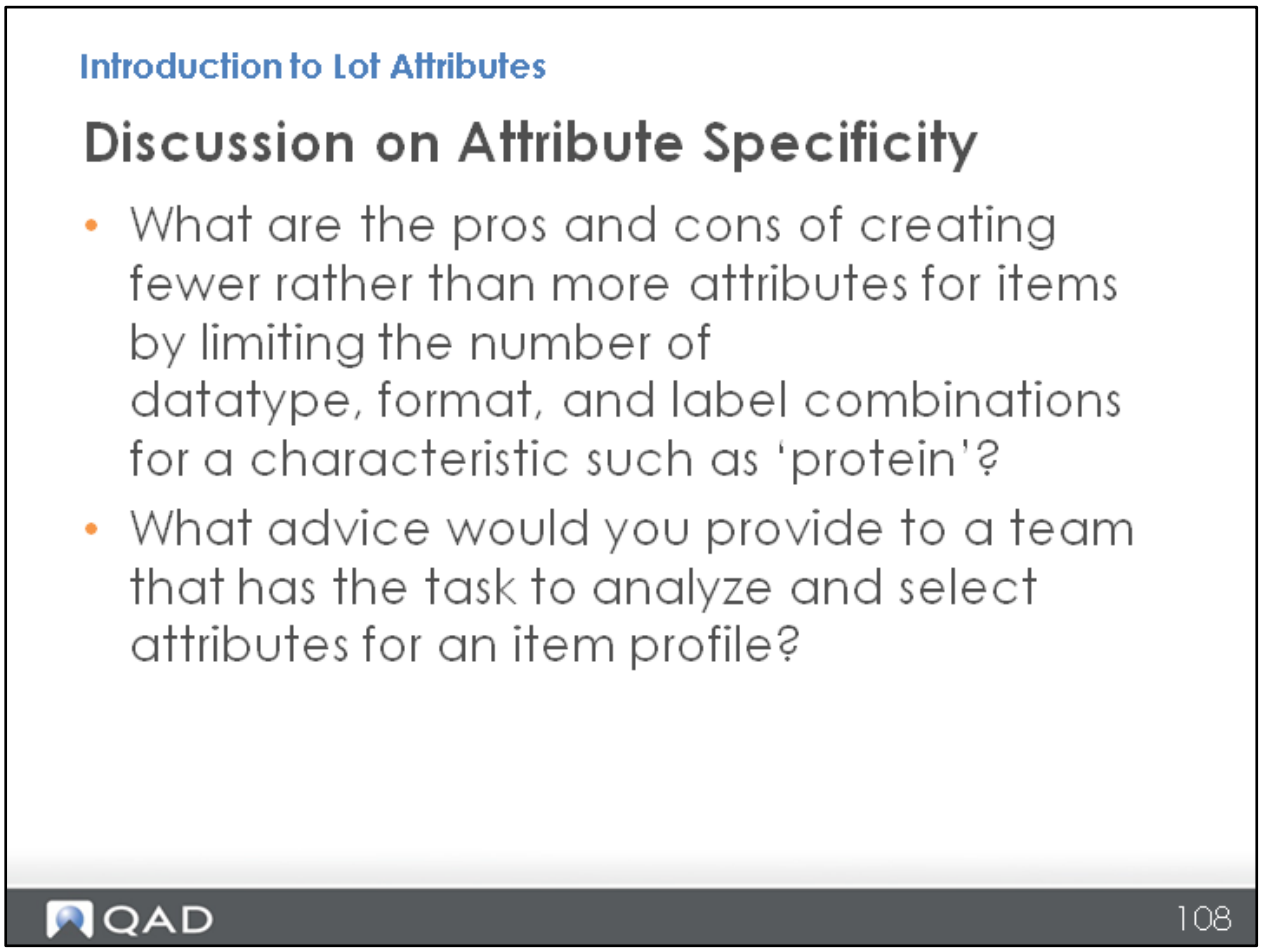
Attribute with Logical Datatype



Use of Logical Attributes



Discussion on Attribute Specificity

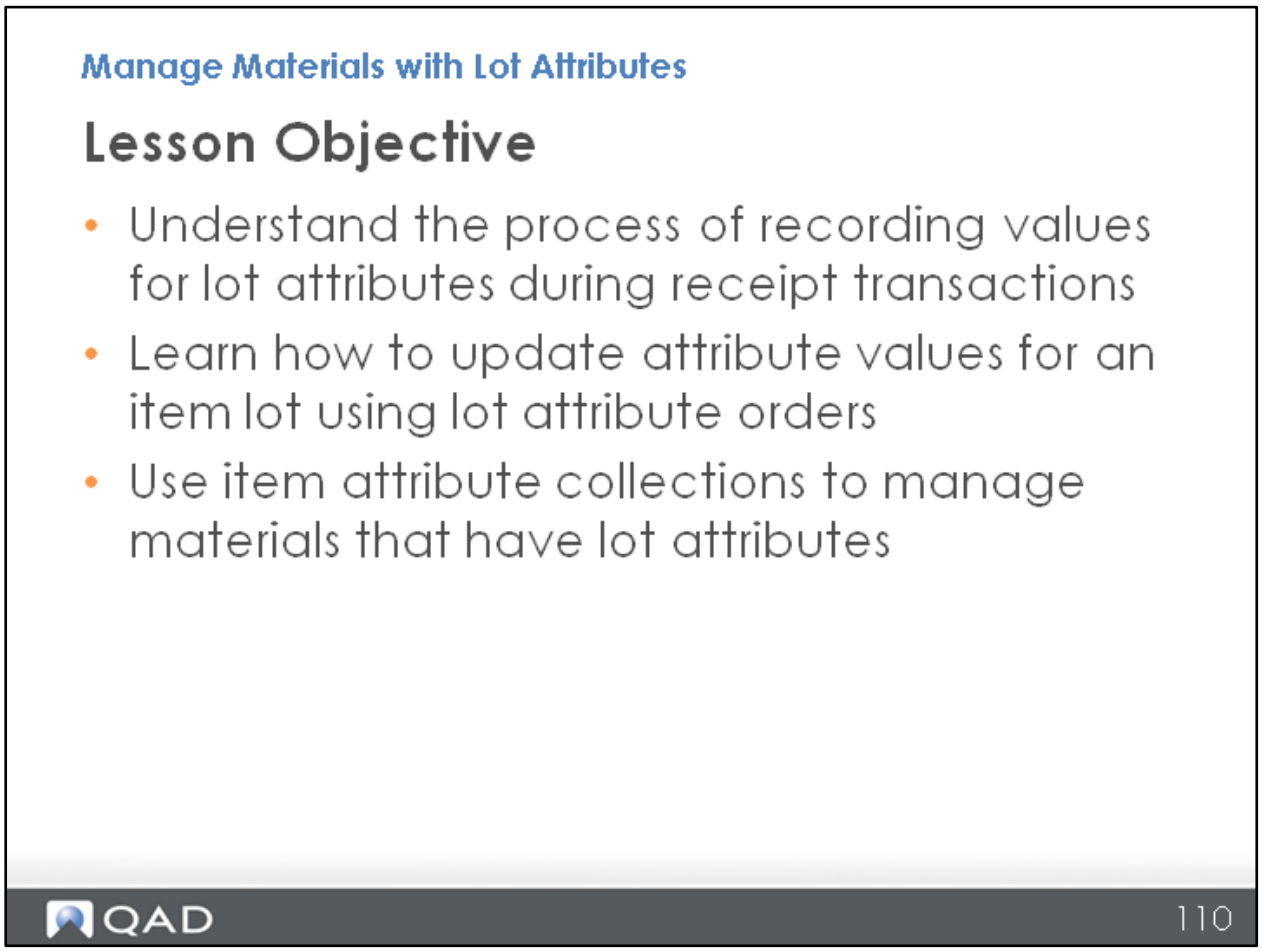


CHAPTER 6

Lot Attribute Orders

Manage Materials with Lot Attributes

Lesson Objective



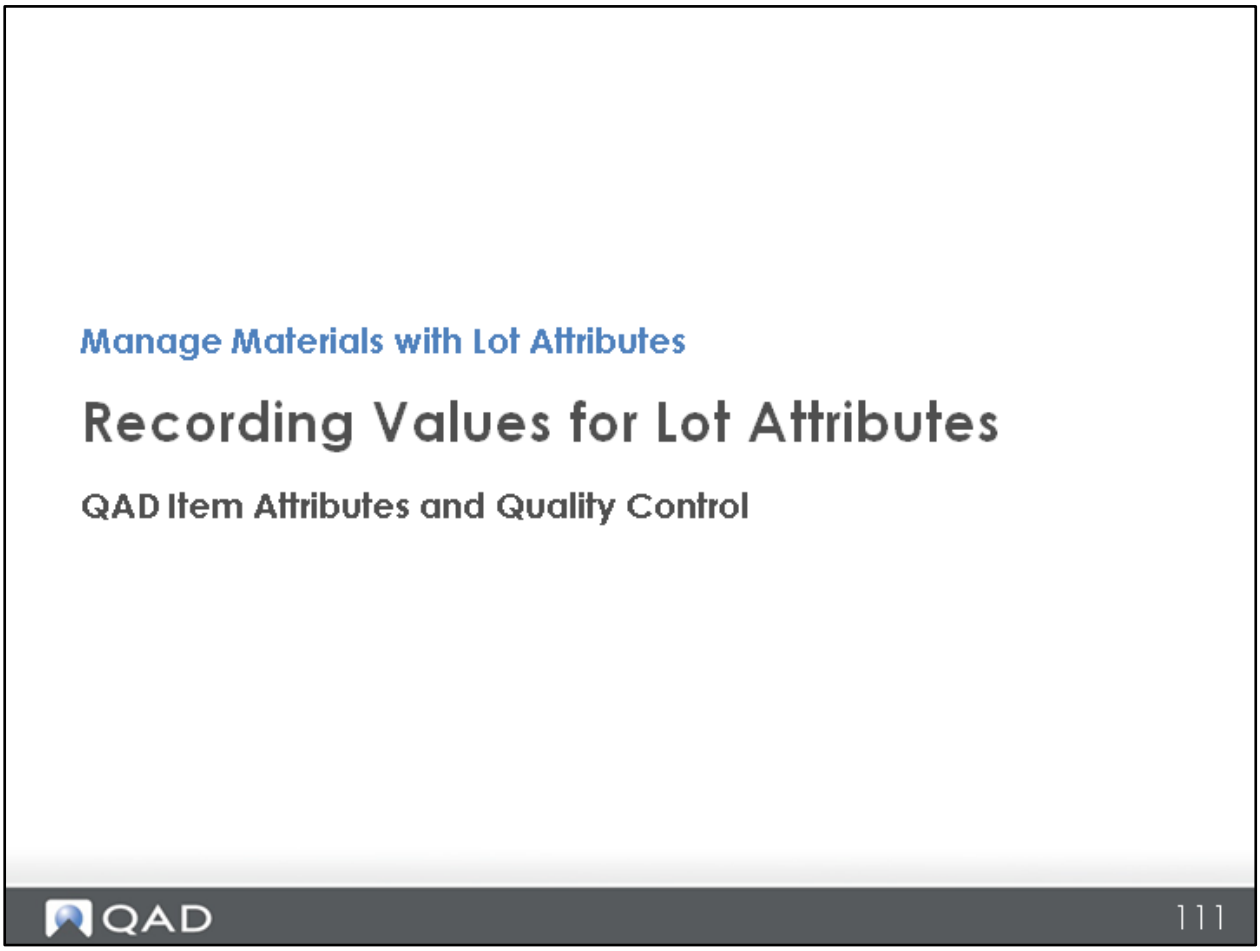
This section of training covers how to use QAD Item Attribute to configure, process, and record attribute values for item lots.

In this training you will become familiar with the key concepts that explain and enable lot attribute

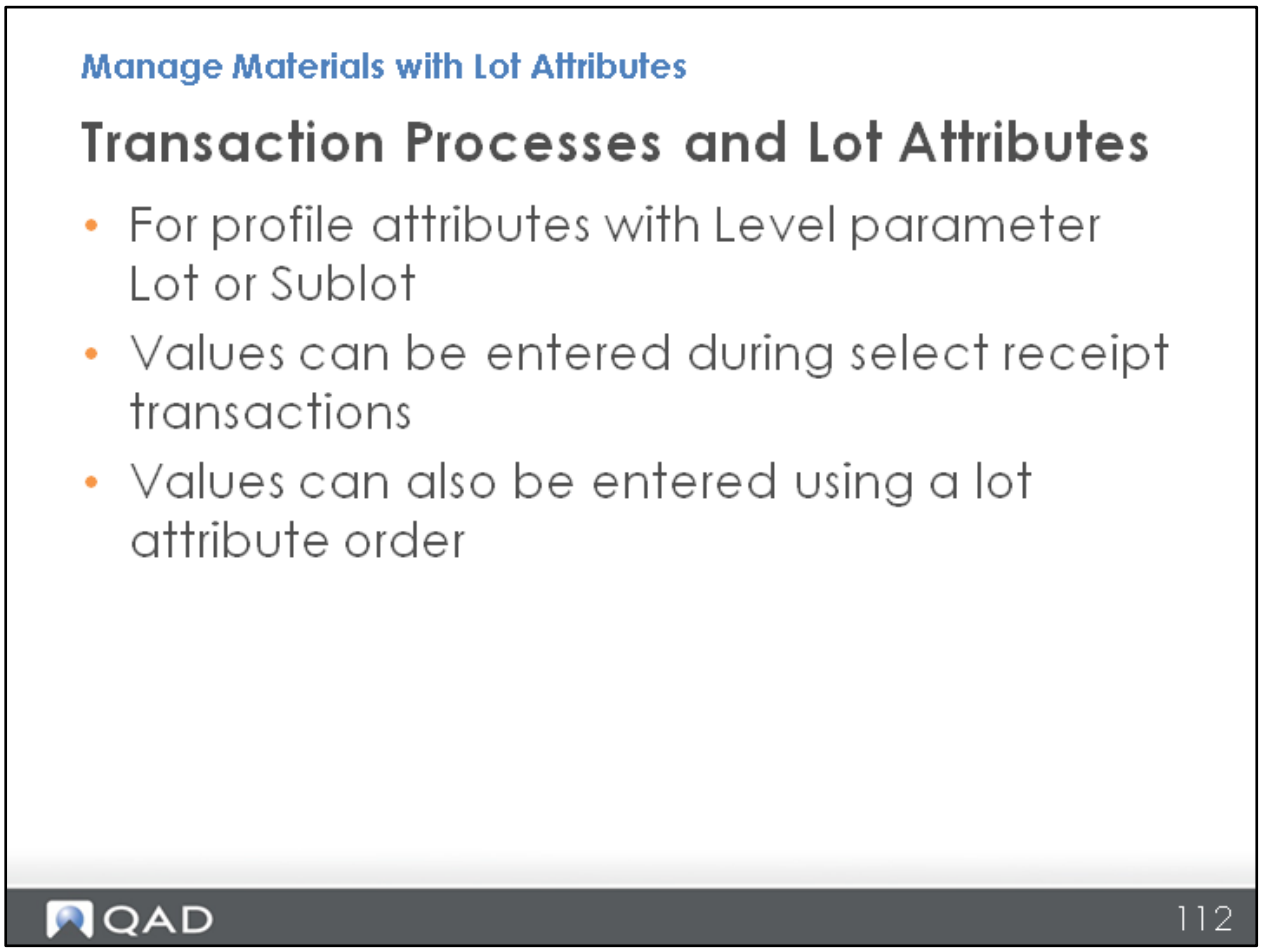
You will learn how lot attributes differ from regulatory attributes and how the two interact.
You will also understand sublots, and the function they perform within the system.

Finally, you will complete an exercise that includes the entering and processing of values for lot attributes.

Recording Values for Lot Attributes



Transaction Processes and Lot Attributes

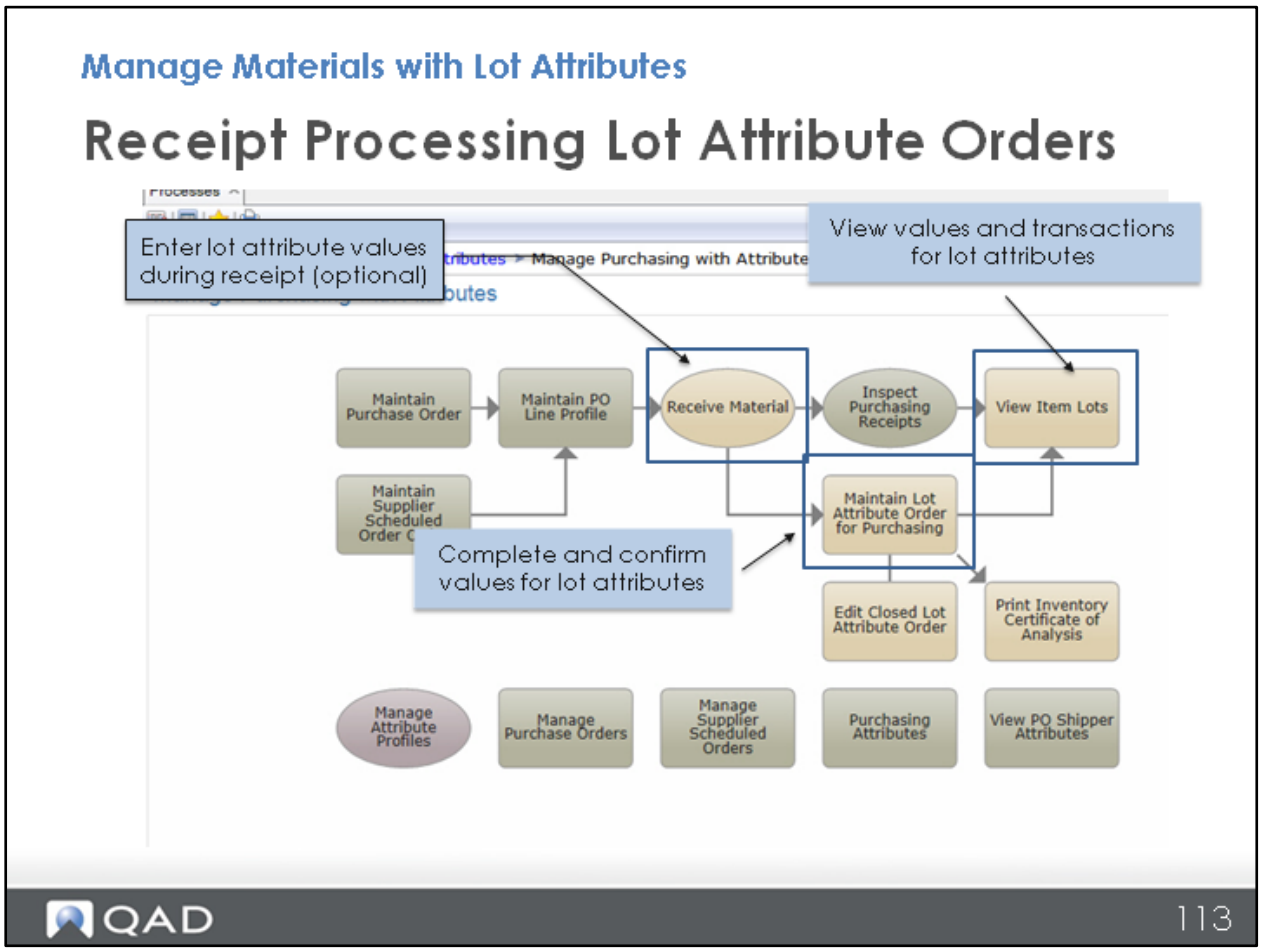


Values can optionally be entered using receipt transactions

Receipt of purchase orders, work orders, repetitive schedules, inventory transfers, receipts – unplanned

Values can also be entered using a lot attribute order, created by selected receipt transactions (or created manually) to confirm lot attribute values

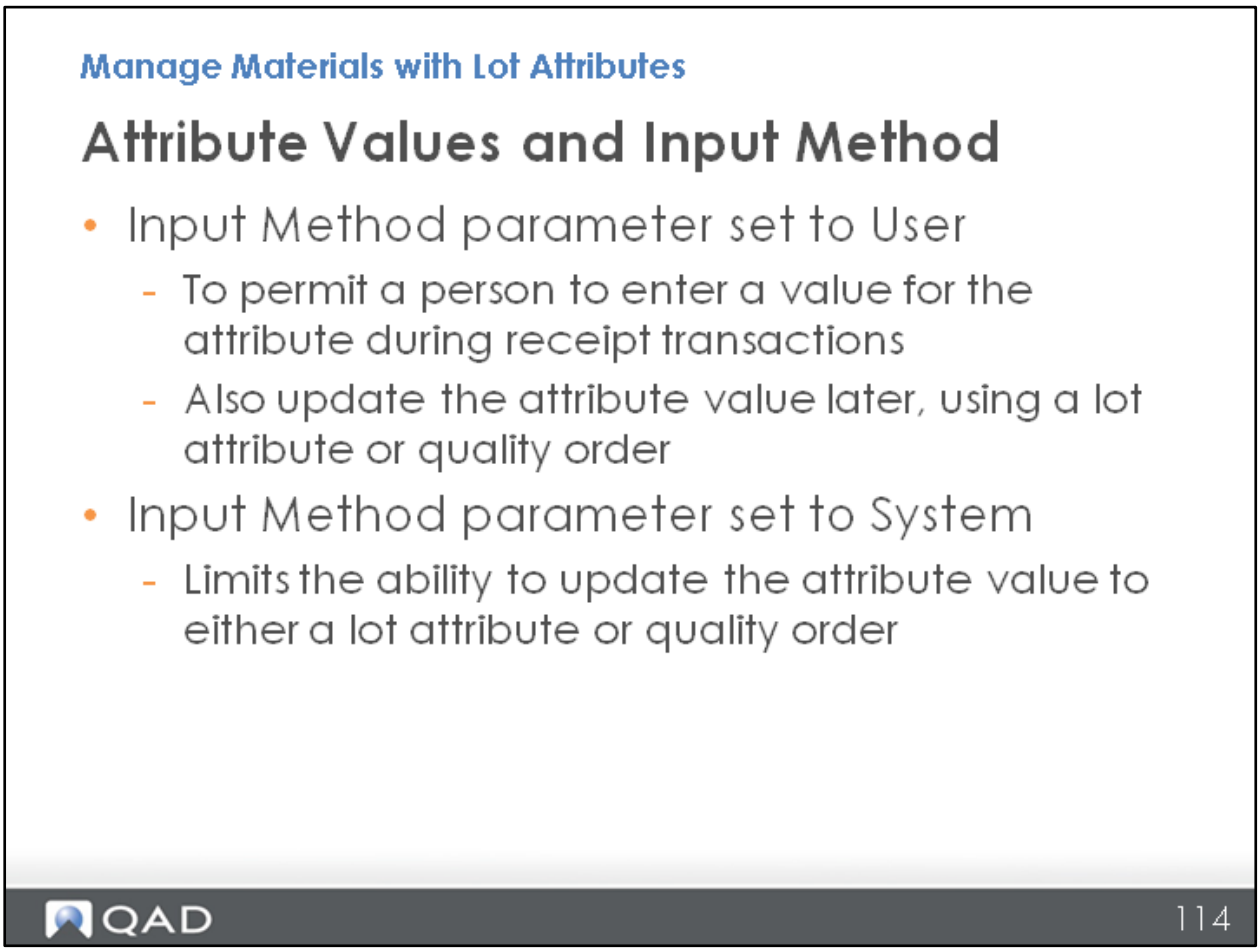
Receipt Processing Lot Attribute Orders



This section of this guide covers the processing of lot attribute orders generated through receipts.

You can find the process maps important to this process in:
Home > Manage Enterprise Item Attributes > Manage Purchasing with Attributes

Attribute Values and Input Method

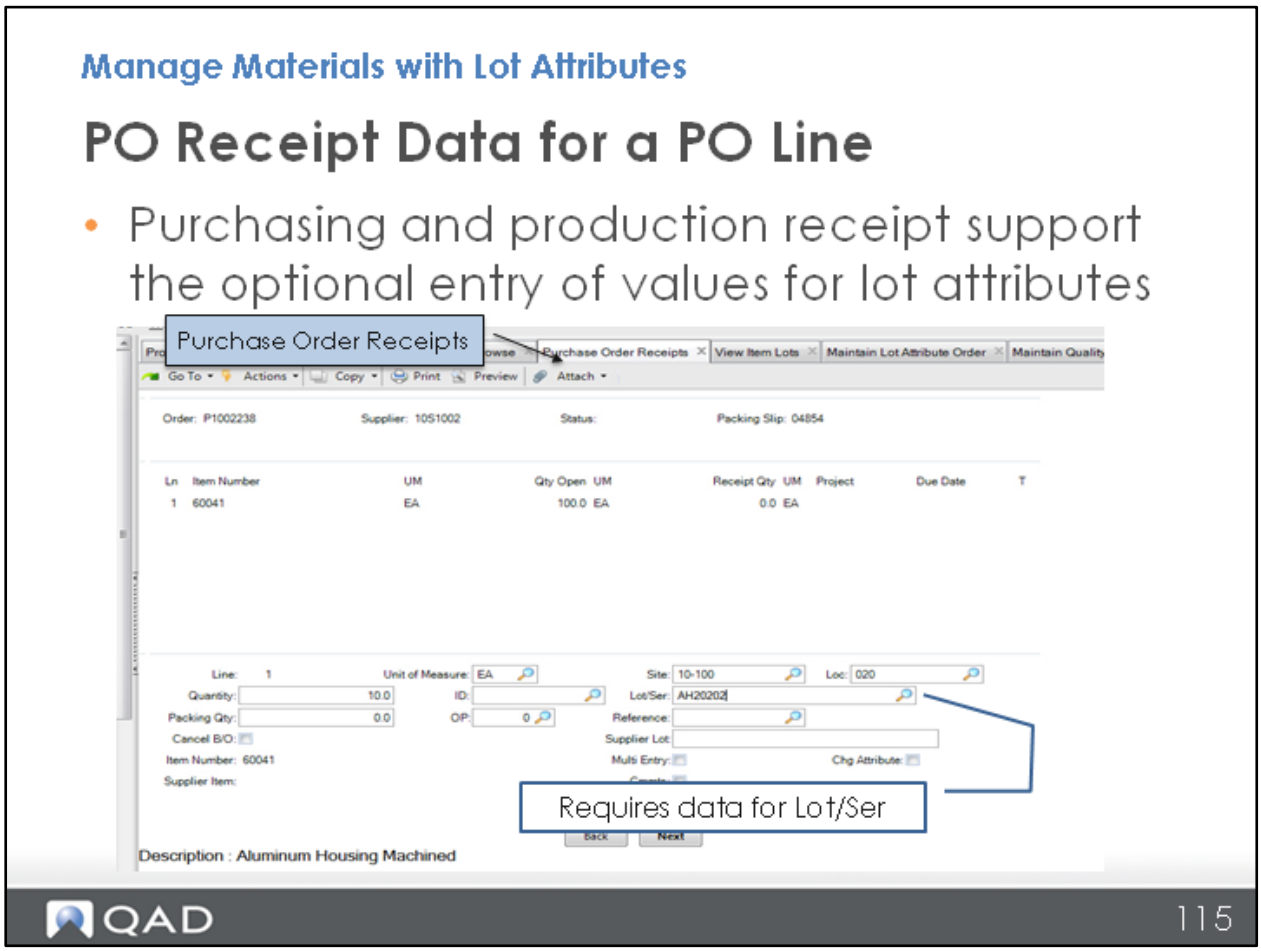


There are two scenarios for updating values for Lot and Sublot level attributes for an item lot.

First, you can view attributes and enter them at the point of transaction receipt. This is an option when the Input Method for a profile attribute is set to User.

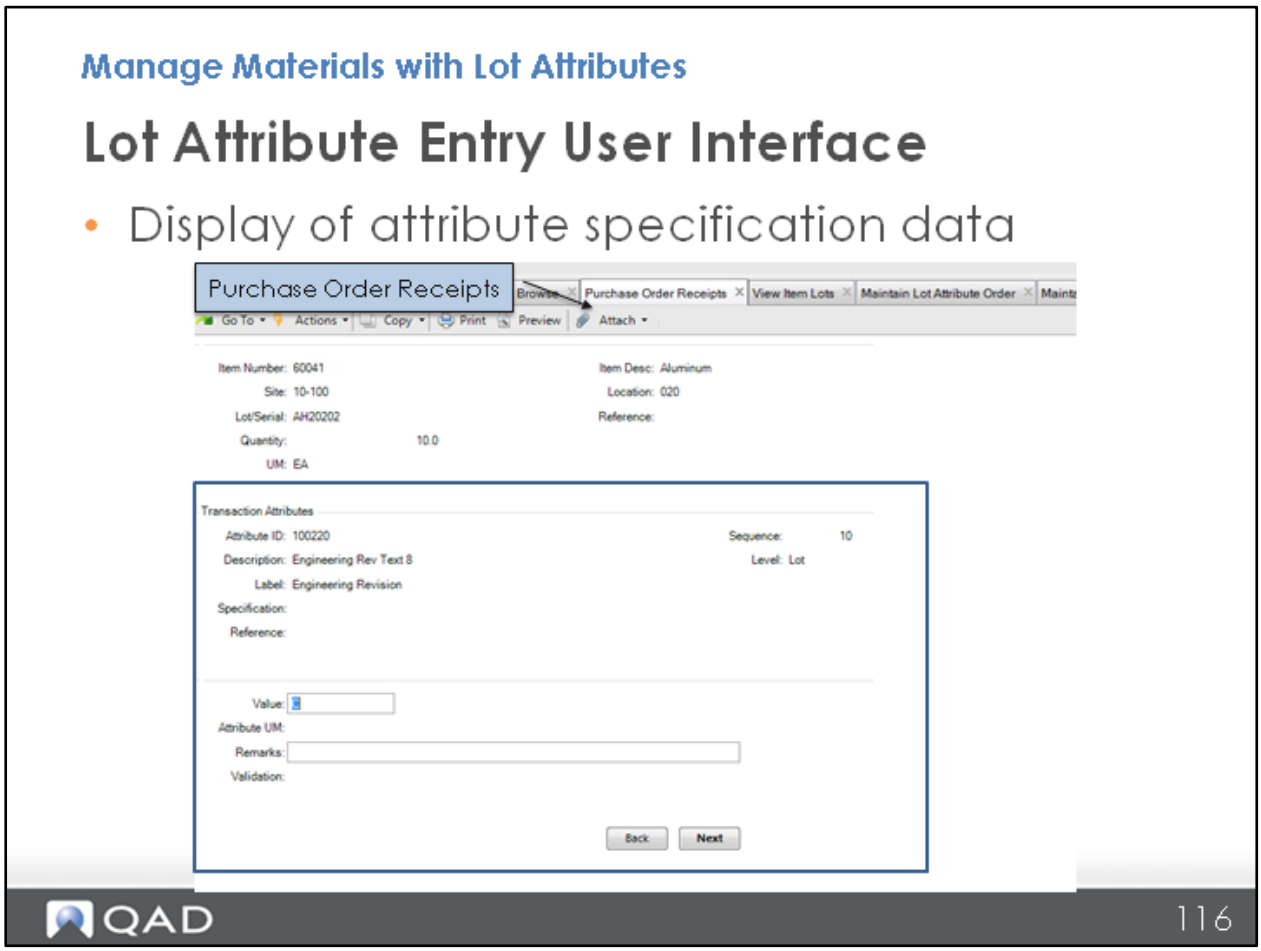
Second, you can enter them in a lot attribute order or quality order created automatically by a receipt transaction, or created manually. This is an option when the Input Method is set to either User or System. Set the Input Method parameter to System to prevent the value for an attribute from being entered upon receipt.

PO Receipt Data for a PO Line



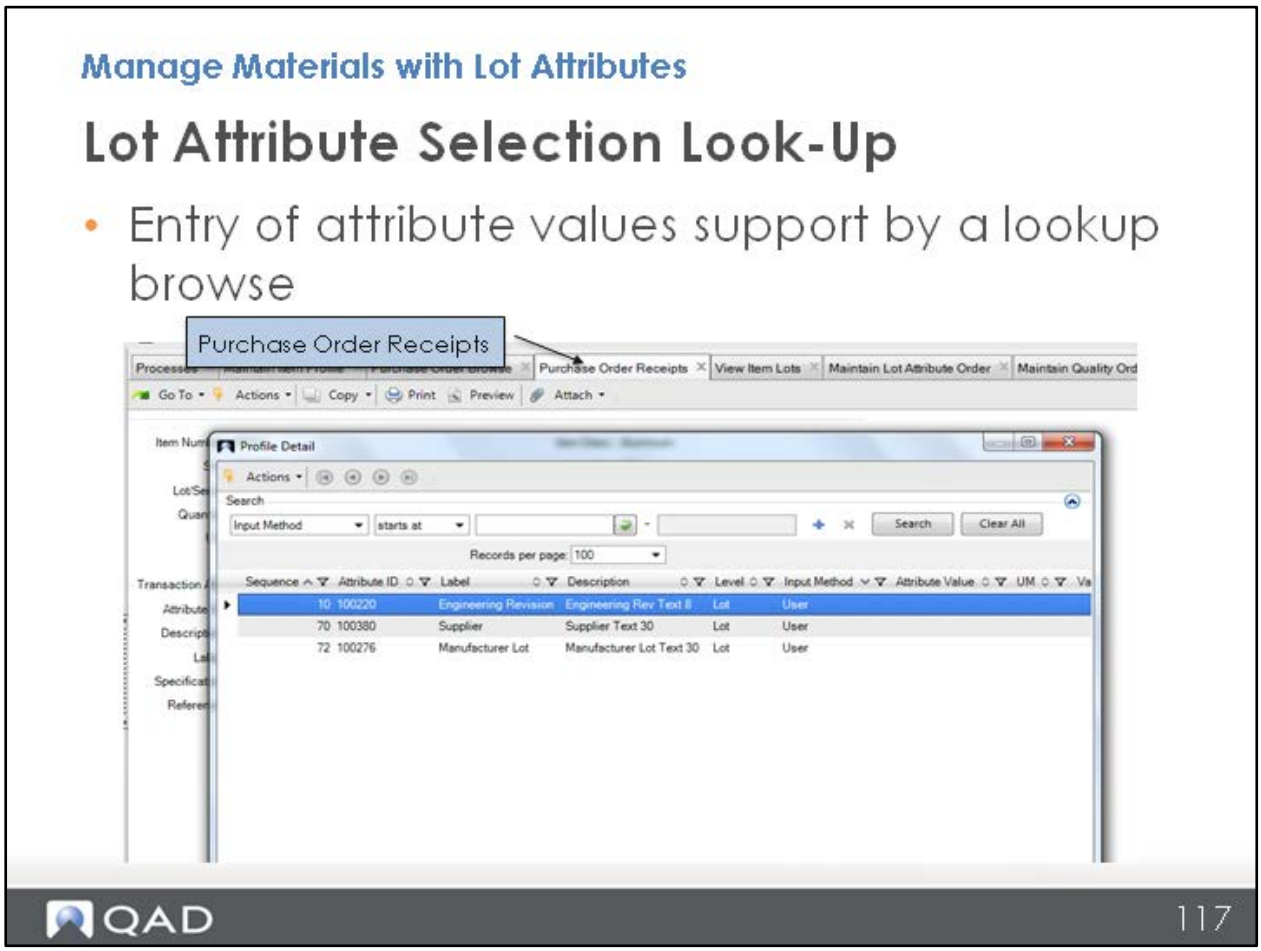
Lot attributes require an associated lot. Therefore, you can only generate a lot attribute or lot attribute order if you specify a lot or serial when receiving an order.

Lot Attribute Entry User Interface



Enter Value and other fields for the attribute. Then click Next to save the information. After entering all attributes you intend to enter, click Back to finish saving the purchase order.

Lot Attribute Selection Look-Up

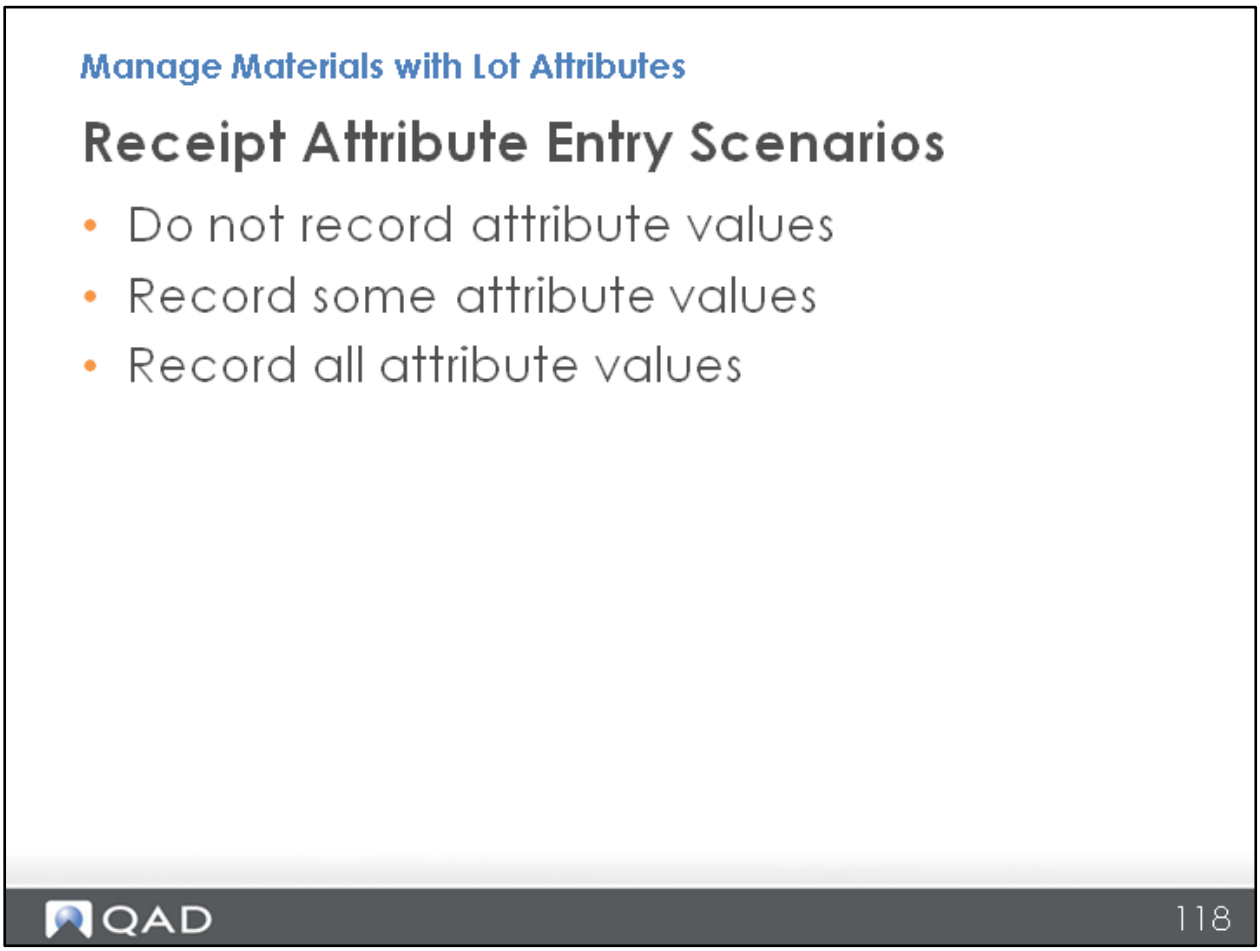


After receiving a purchase order with attached lot level attributes, you are given a chance to enter attributes.

To enter a specific attribute, first select it using the Lookup tool.

You can enter attributes with an Input Method of User.

Receipt Attribute Entry Scenarios



When entering attribute values at the time of receipt, you can enter all, none, or some of them.

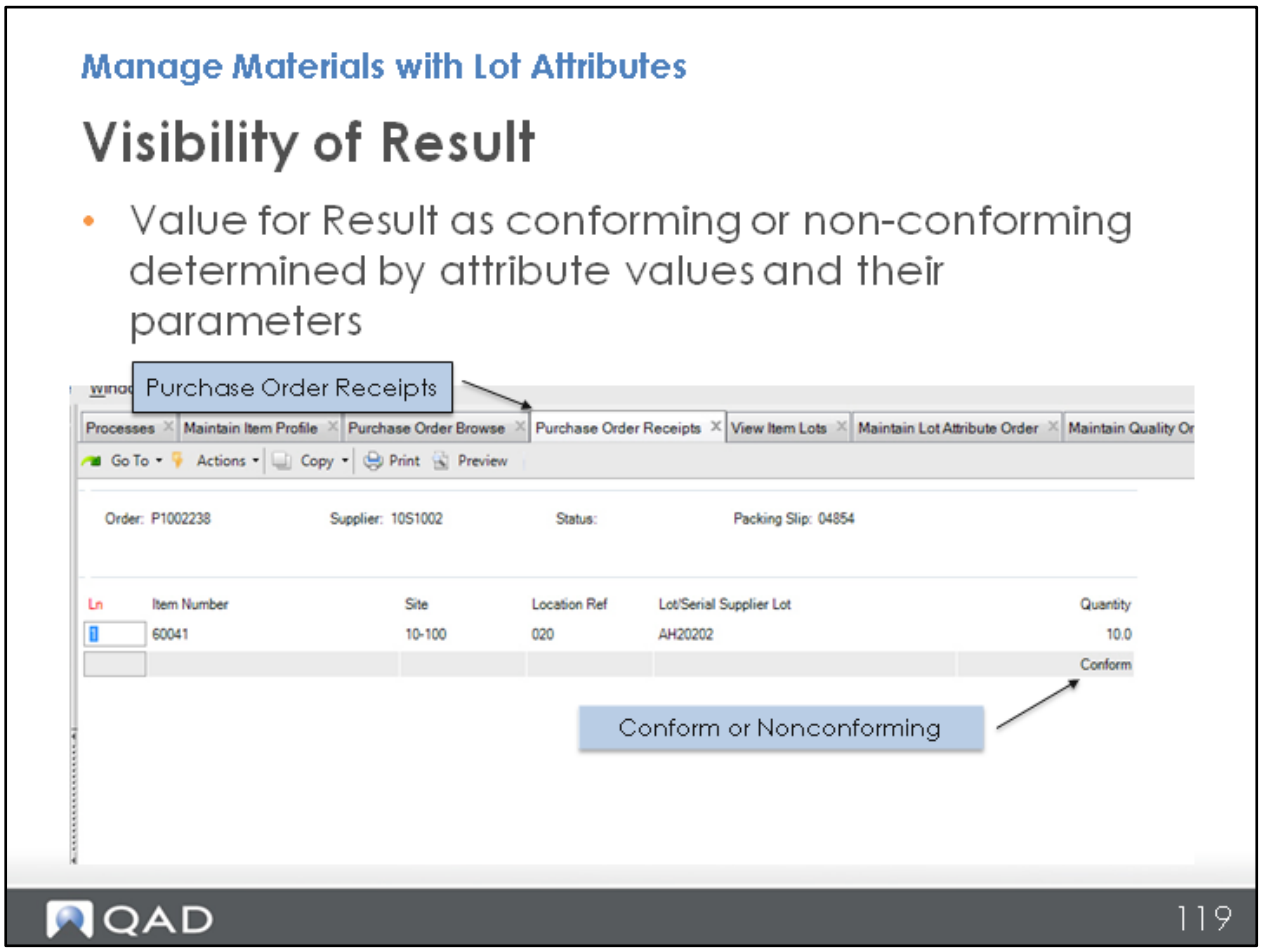
Any attributes you enter copy to the item lot. That attribute then counts as Entered.

If you enter all required attributes at the time of receipt, then the system does not create a lot attribute order.

If you enter no attributes, or only some required attributes, then the system creates a lot attribute order for the remaining attributes of the lot.

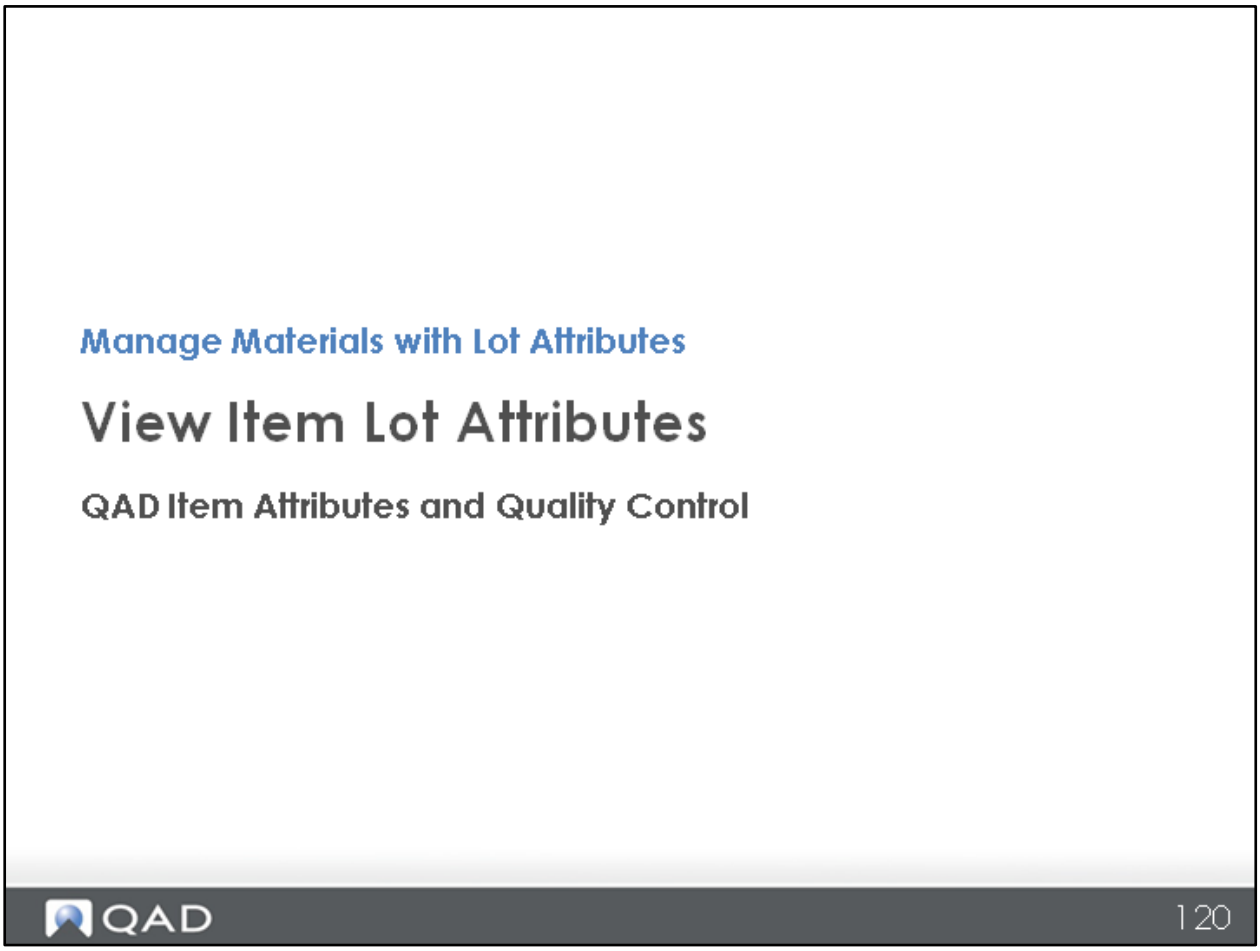
Note: If you processed a blank attribute value for an attribute with an Input Method of System, then QAD EE will treat that attribute as entered for the purpose of generating a lot attribute order.

Visibility of Result

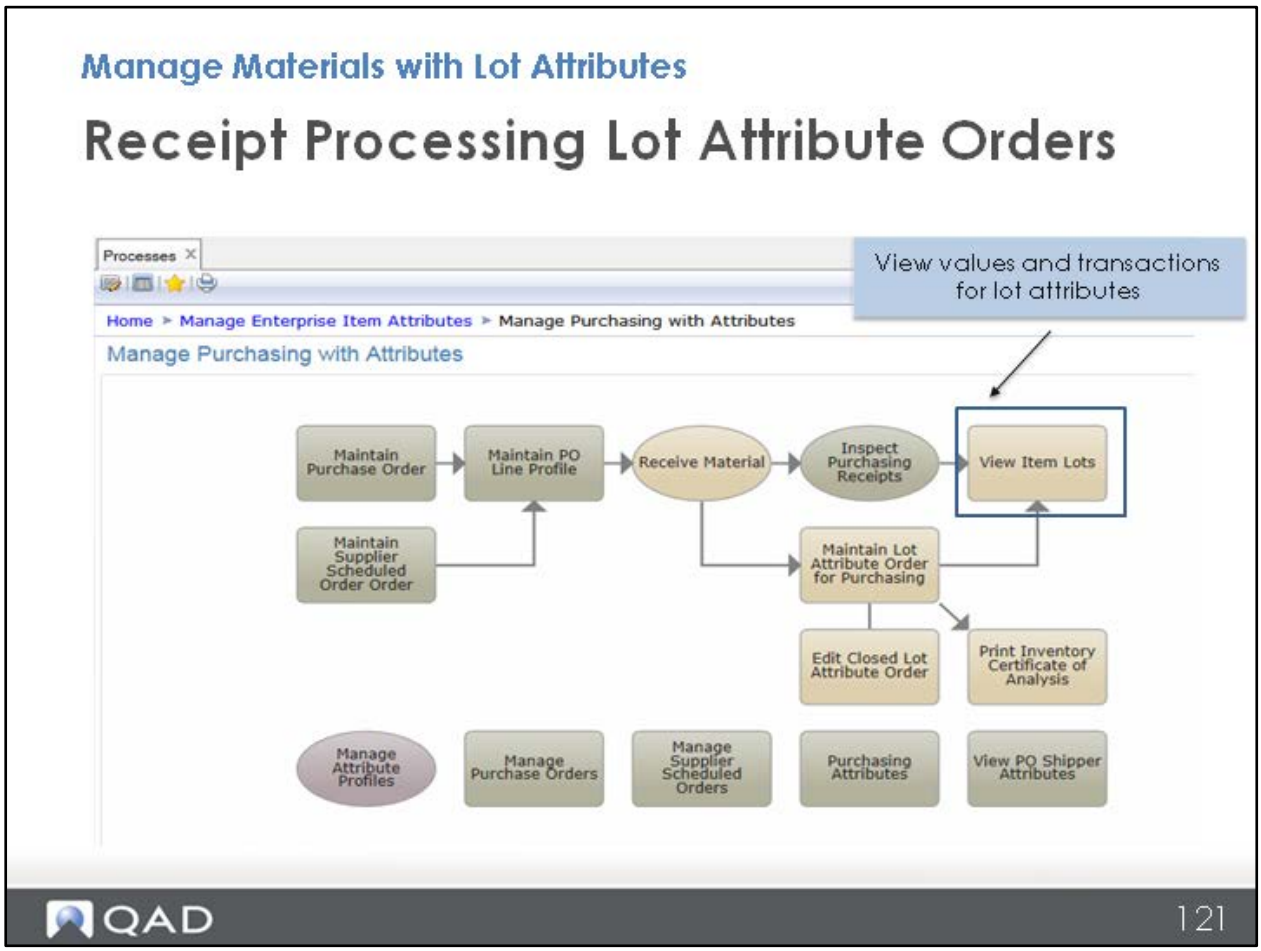


After entering attributes for the receipt, view the lines for the order and the Result for each lot.

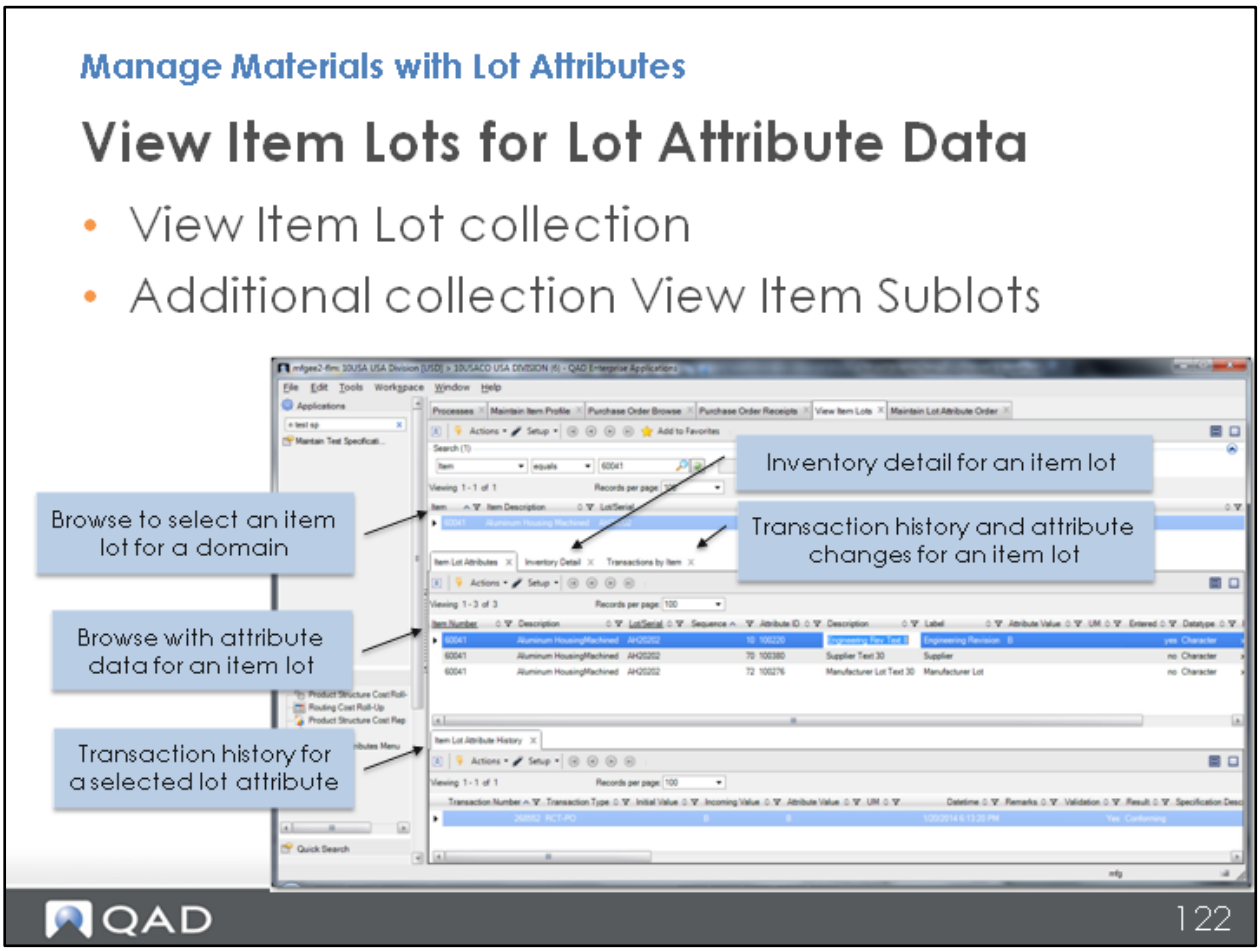
View Item Lot Attributes



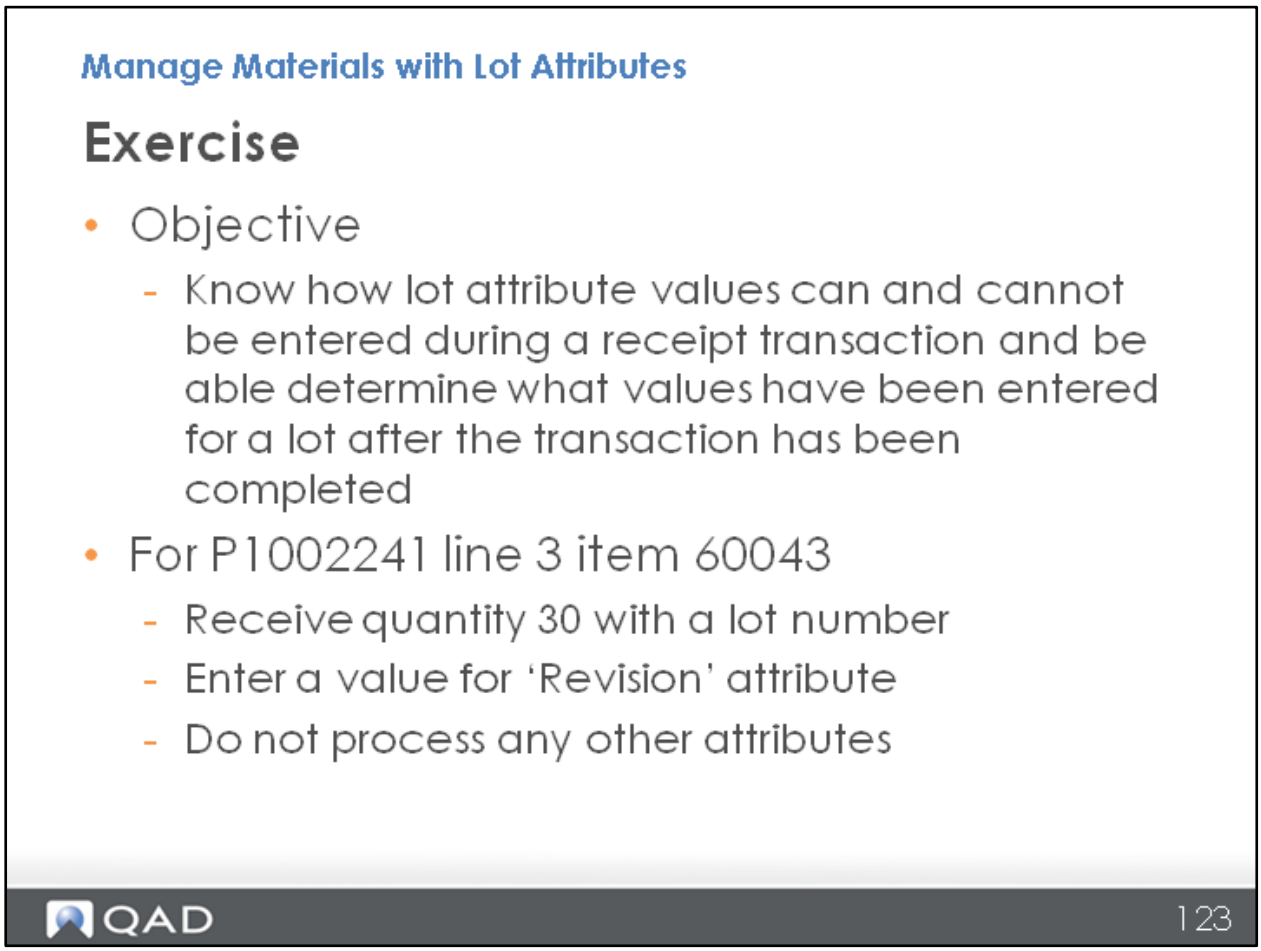
Receipt Processing Lot Attribute Orders



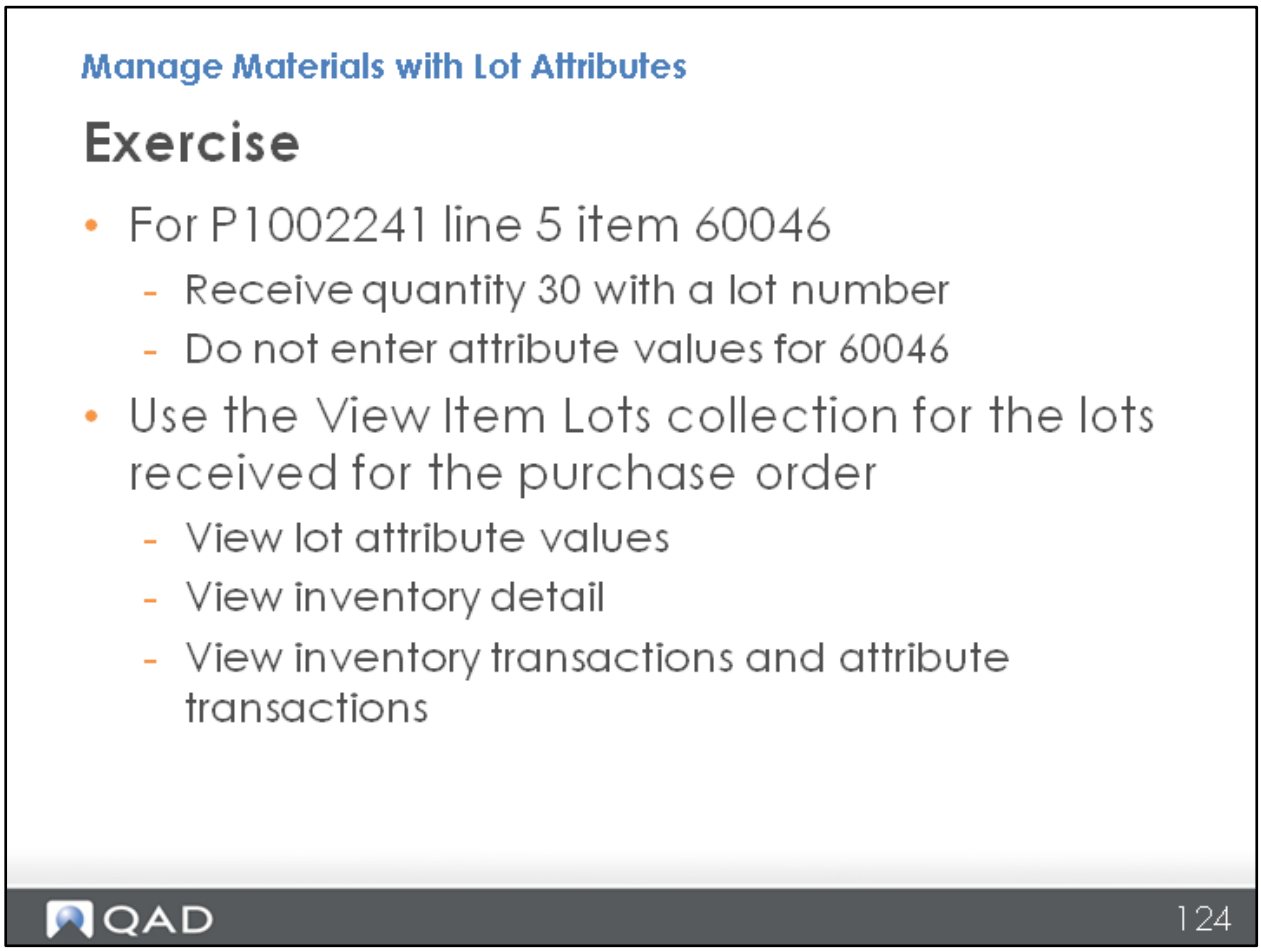
View Item Lots for Lot Attribute Data



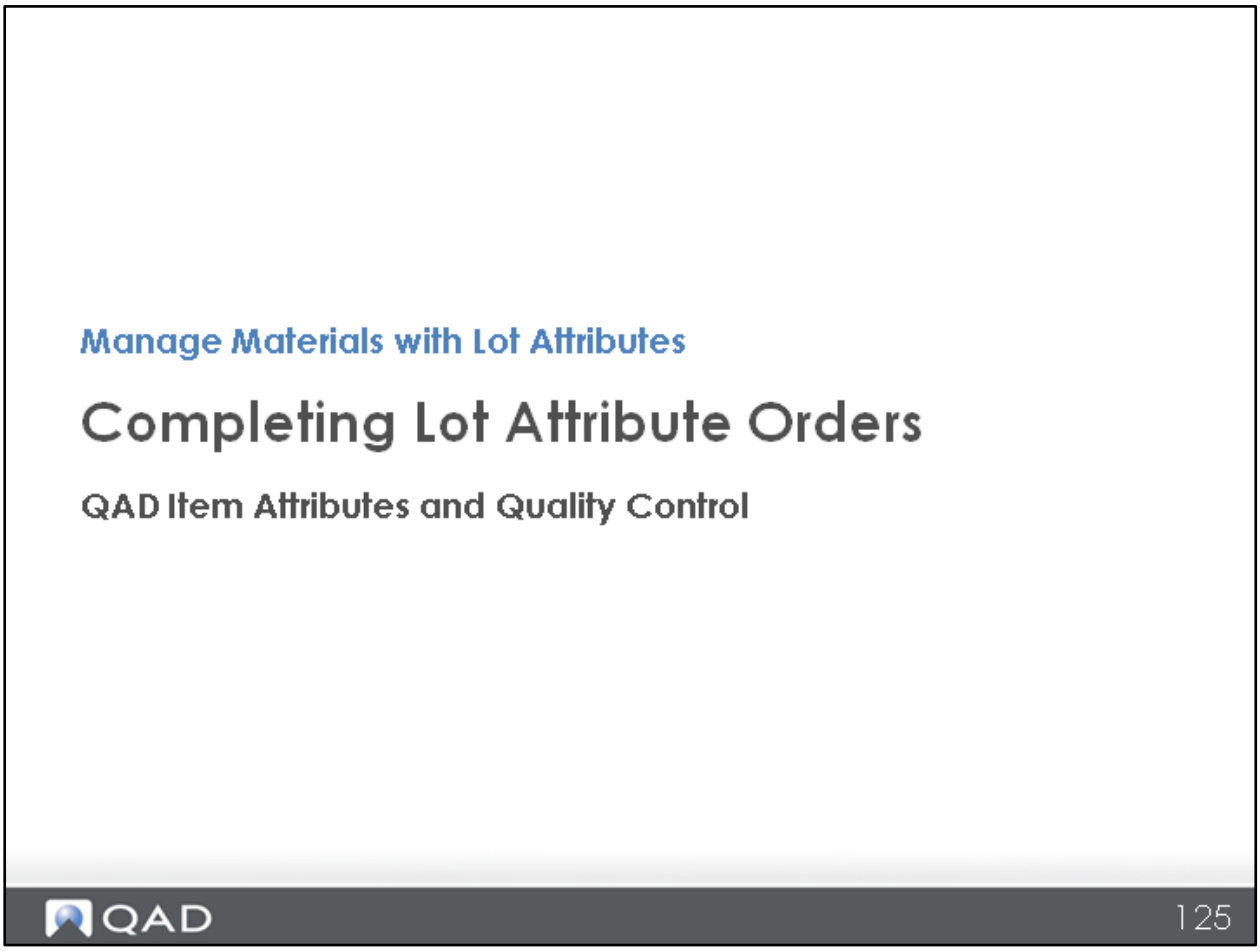
Exercise


Manage Materials with Lot Attributes
Exercise
• Objective
- Know how lot attribute values can and cannot be entered during a receipt transaction and be able determine what values have been entered for a lot after the transaction has been completed
• For P1002241 line 3 item 60043
- Receive quantity 30 with a lot number
- Enter a value for 'Revision' attribute
- Do not process any other attributes
QAD
123

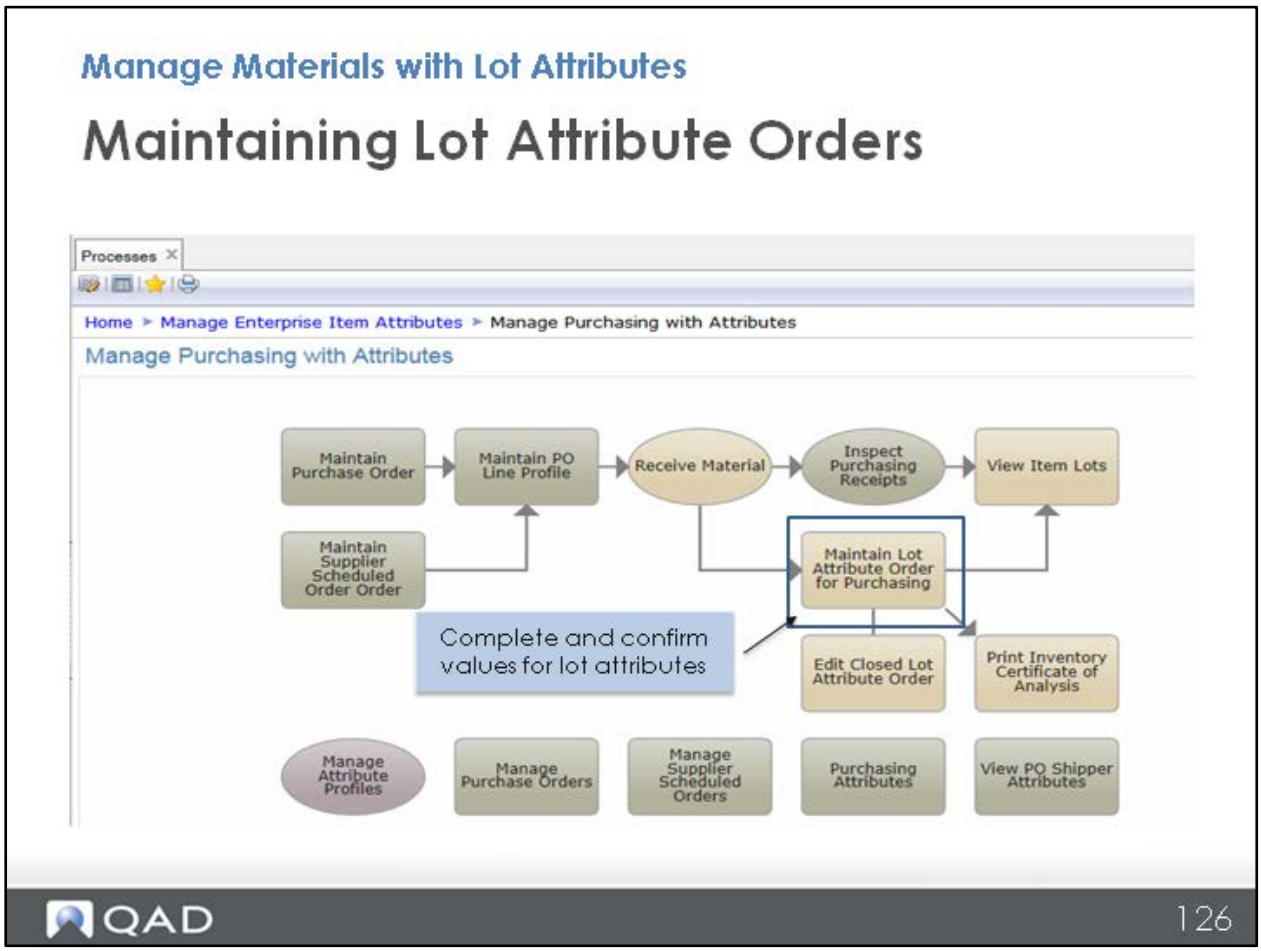
Exercise


Manage Materials with Lot Attributes
Exercise
For P1002241 line 5 item 60046
Receive quantity 30 with a lot number
Do not enter attribute values for 60046
Use the View Item Lots collection for the lots received for the purchase order
View lot attribute values
View inventory detail
View inventory transactions and attribute transactions
QAD
124

Completing Lot Attribute Orders



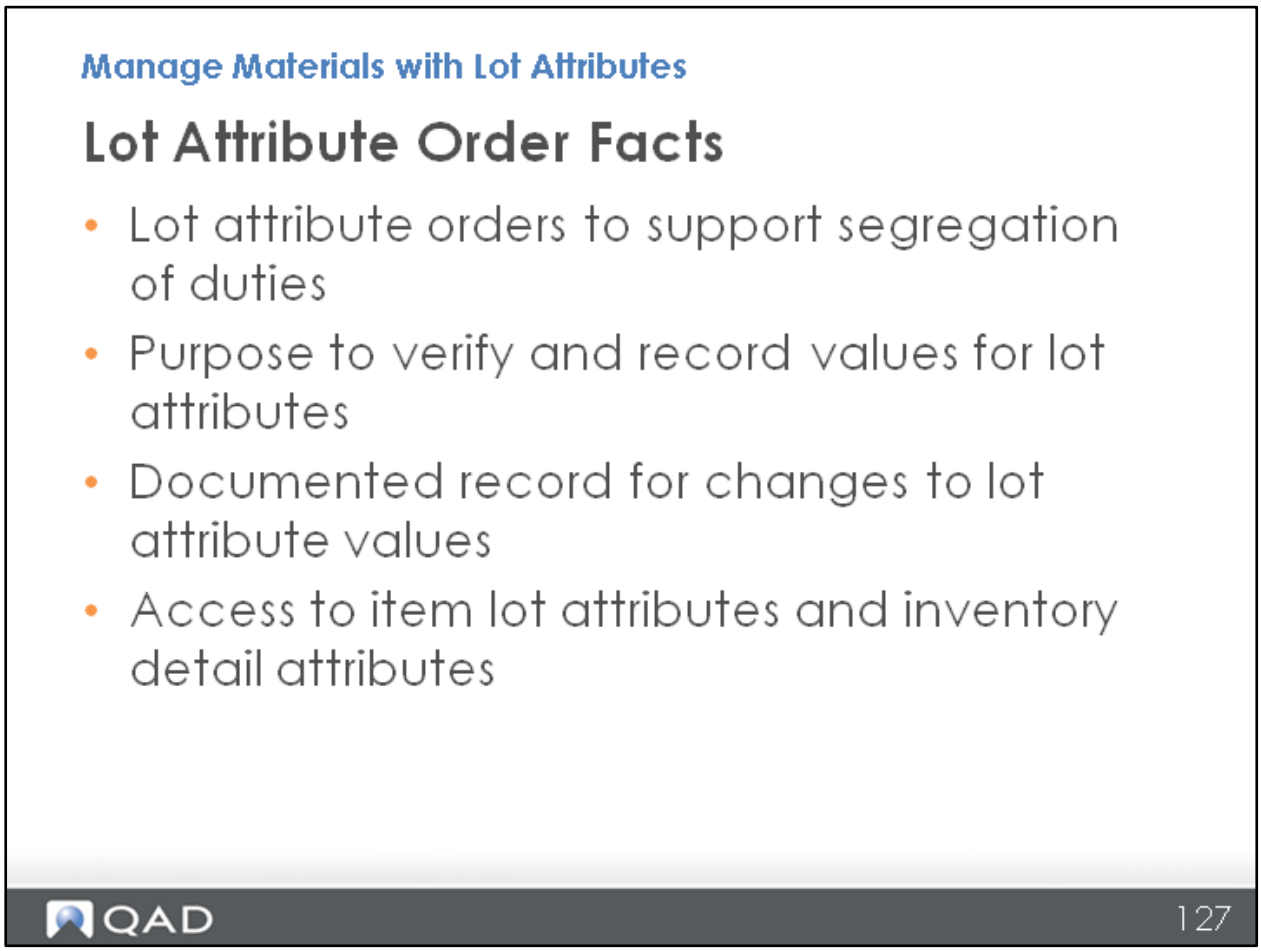
Maintaining Lot Attribute Orders



Lot Attribute Orders are used to complete entry of and confirm the values for lot attributes.

Lot Attribute Orders are not created when all of the required lot attribute values have been entered and there are no tests required for the item.

Lot Attribute Order Facts

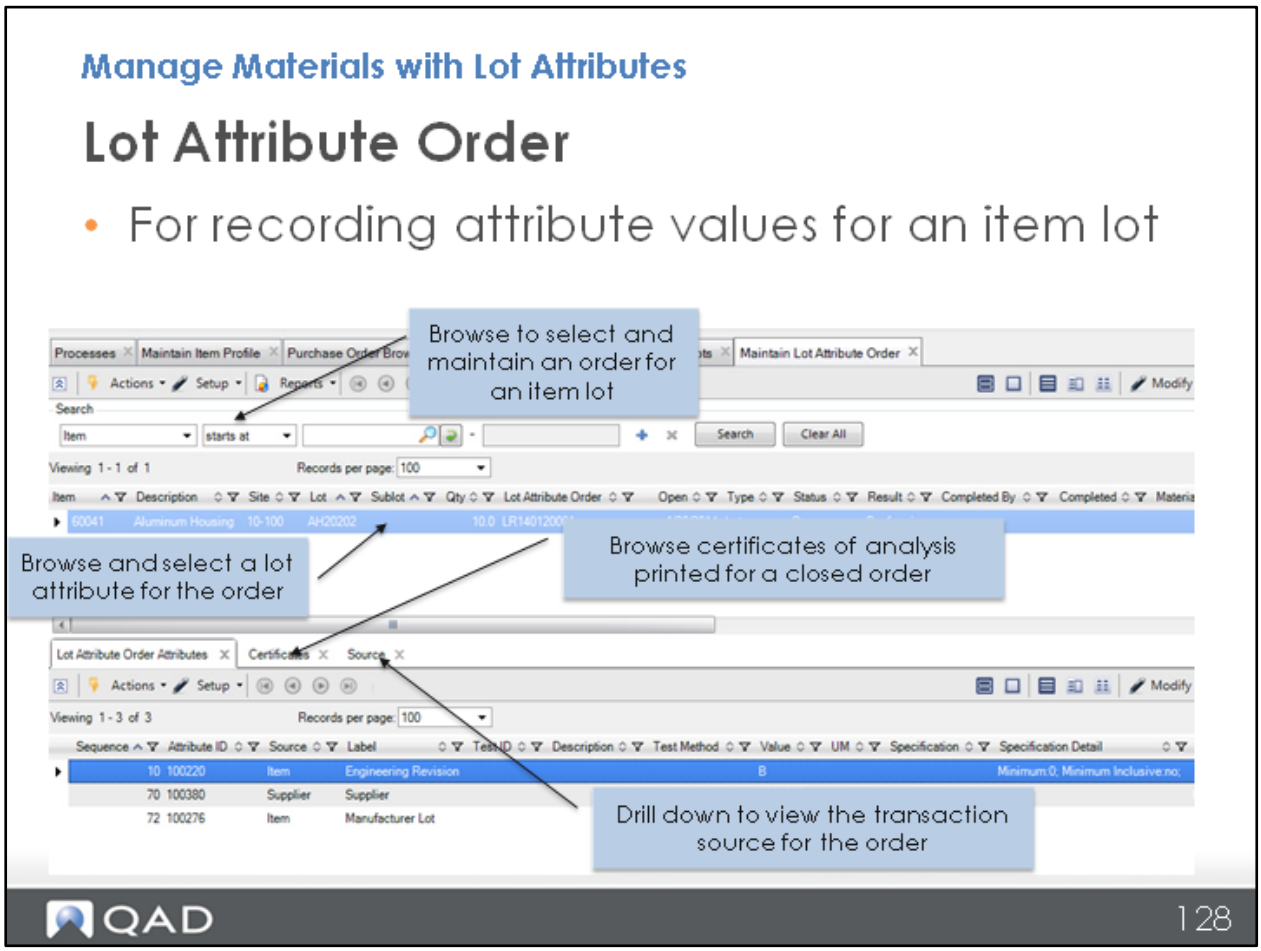


Lot attribute orders support segregation of duties.

When lot attributes are set up with Level = System, a receiving clerk is limited to recording information such as items, lots, quantities and locations, and not permitted to record values for lot attributes.

Lot attribute orders provide administrative users to separate function for recording values for lot attributes, separate from recording the movement of materials.

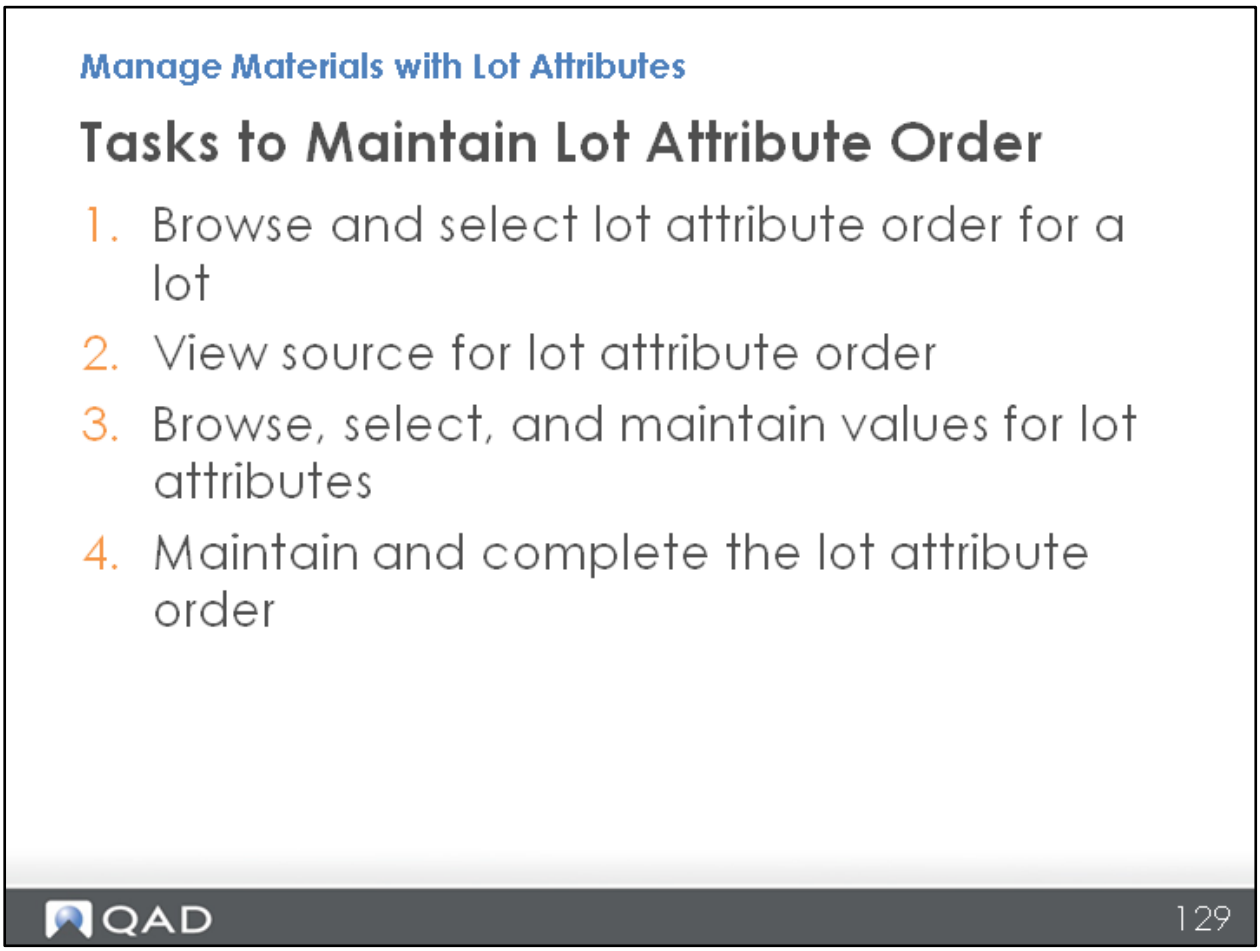
Lot Attribute Order



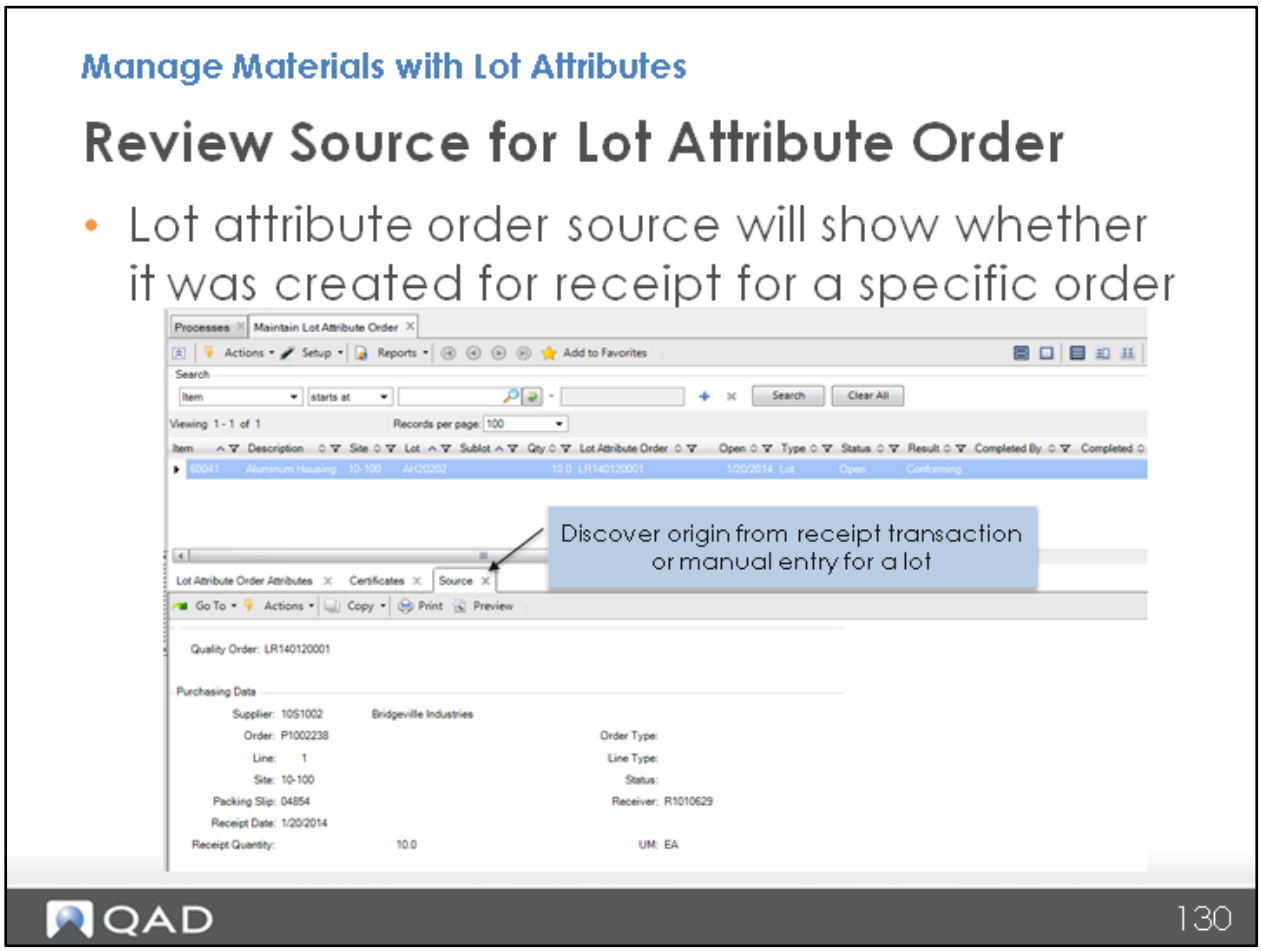
You can access Lot Attribute Orders through the Maintain Lot Attribute Order collection from a process map.

There are complementary collections for recording values for lot attribute orders created for purchase order receipts and for production receipts.

Tasks to Maintain Lot Attribute Order

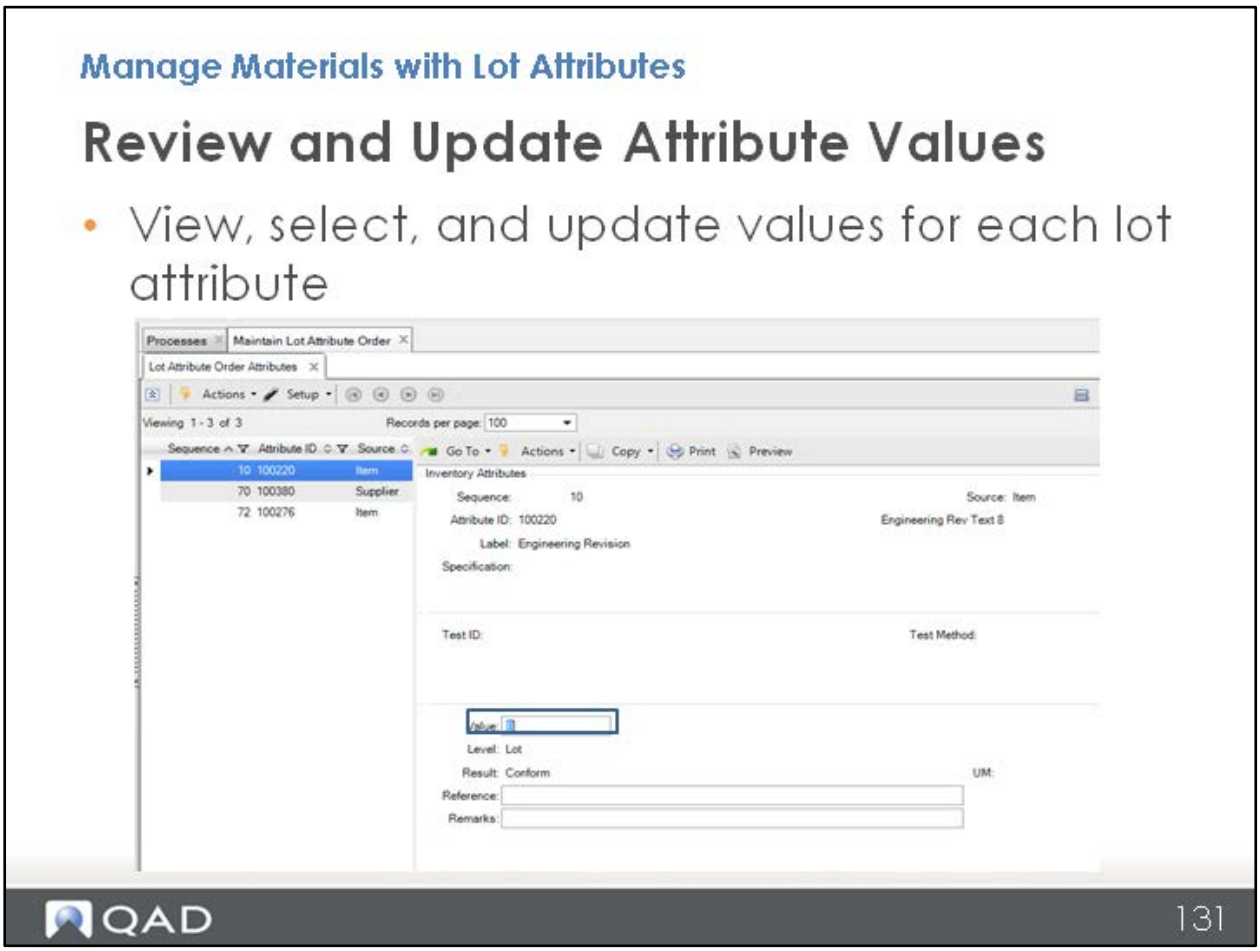


Review Source for Lot Attribute Order



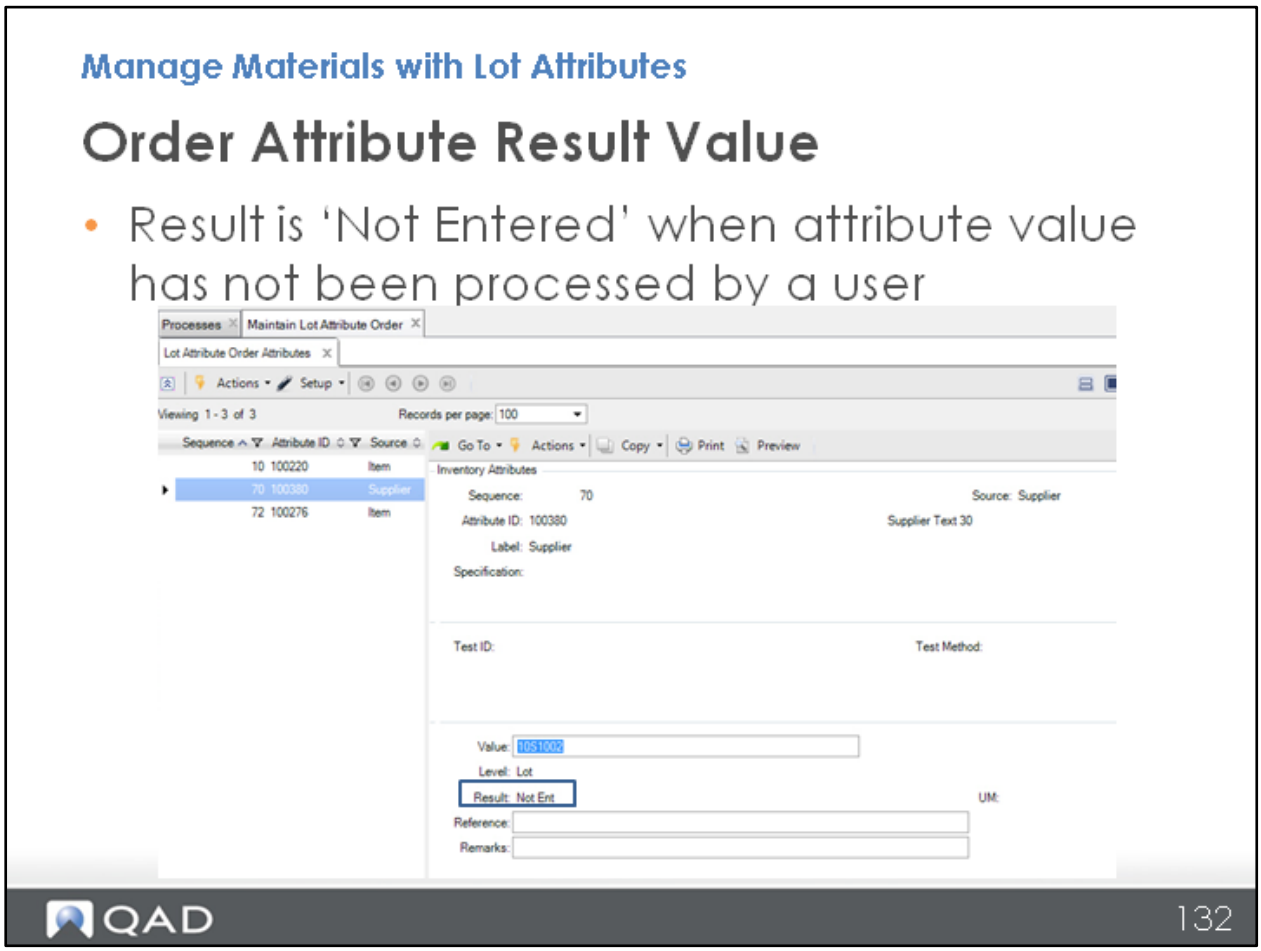
The second level Source tab in a Lot Attribute Order gives information on the creation of a Lot Attribute Order.

Review and Update Attribute Values



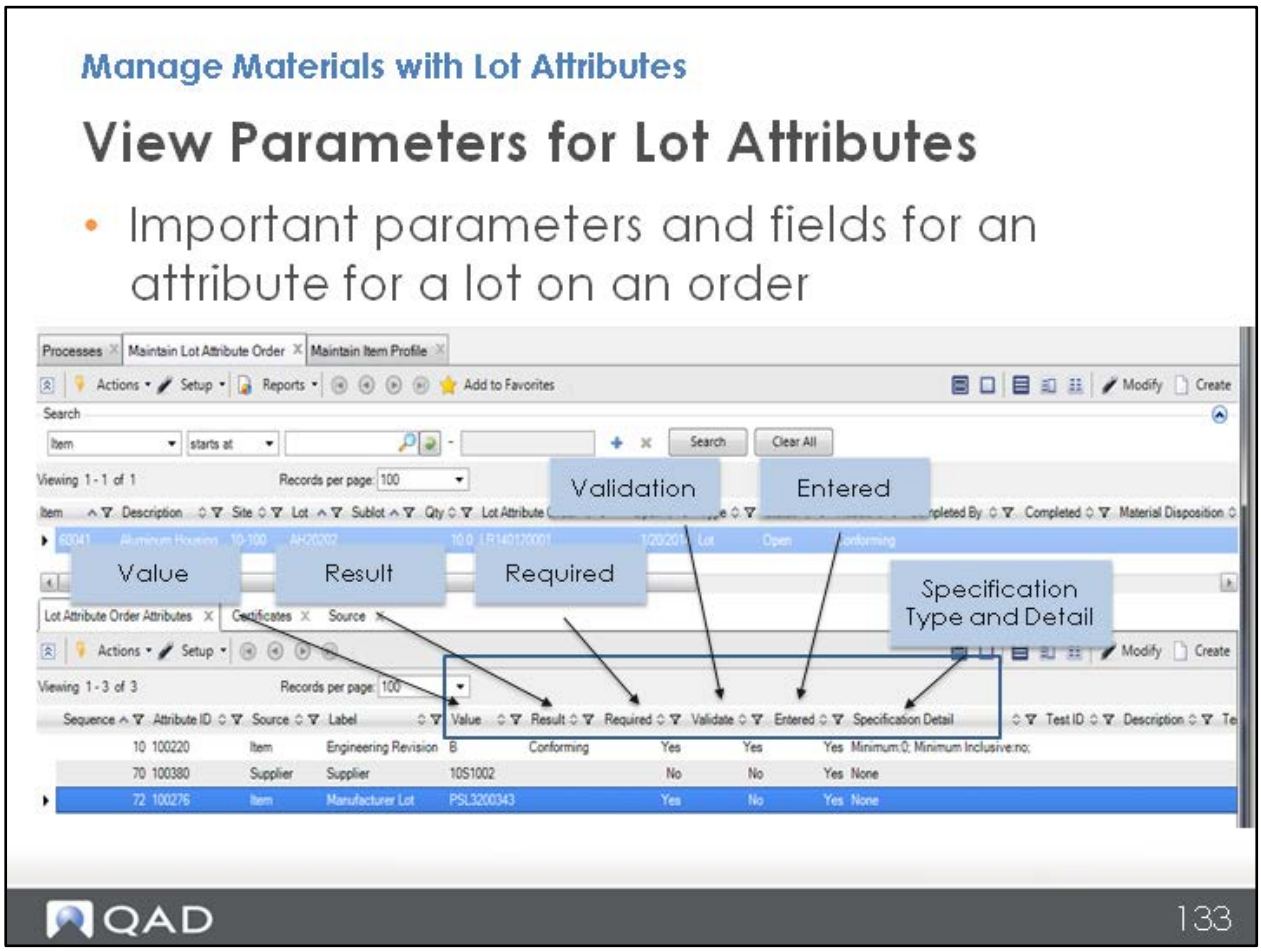
Within the second level Lot Attribute Order Attributes, you can enter values for attributes. To do so, double click the attribute to access the modify function.

Order Attribute Result Value



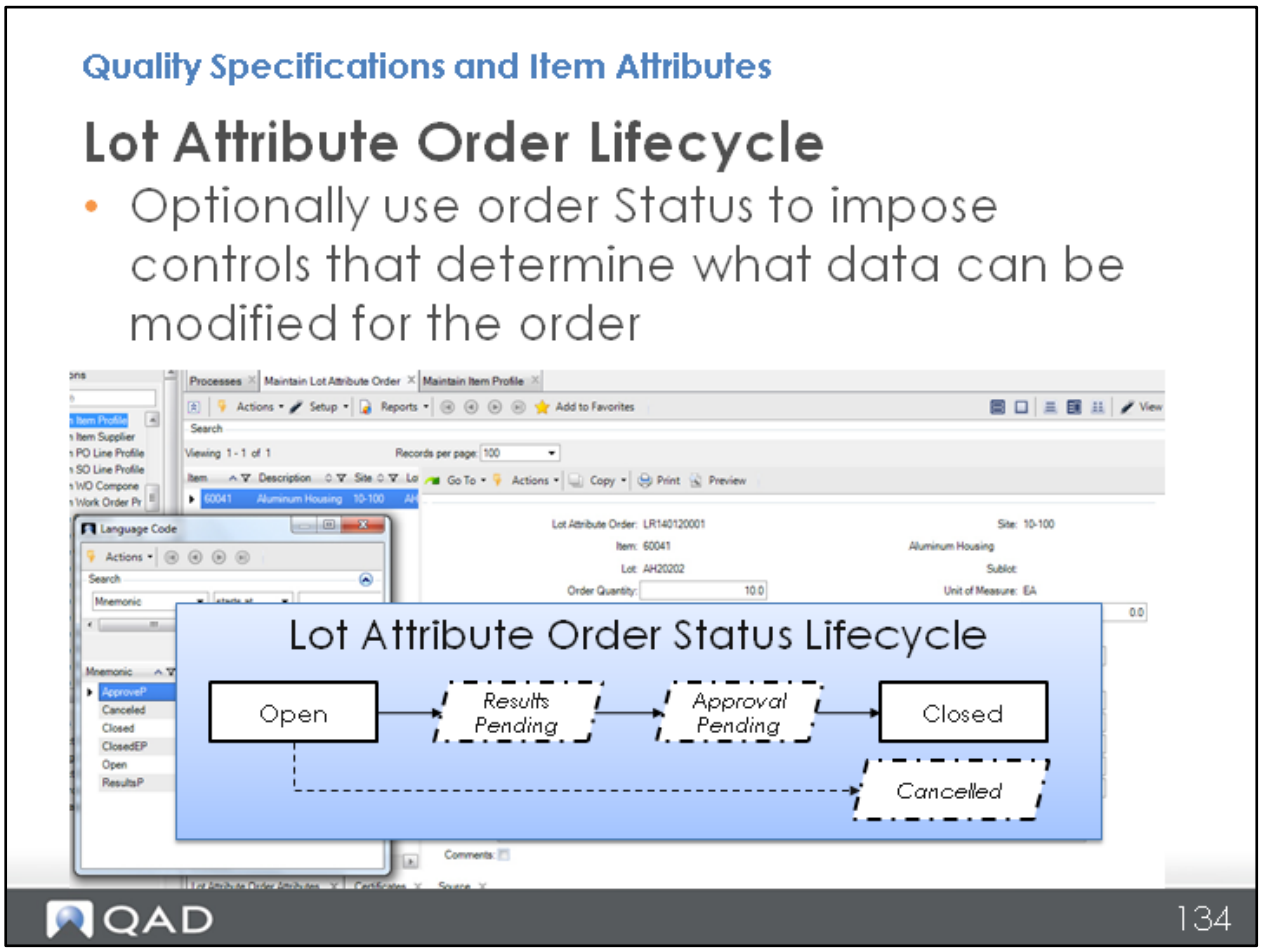
The modify screen for the attributes includes a Result field. This shows whether the attribute has been entered and whether it conforms. The Result field is used to determine when the order can be closed and whether the order as a whole conforms.

View Parameters for Lot Attributes



The second level Lot Attribute Order Attributes tab displays the important parameters of the attributes within the order.

Lot Attribute Order Lifecycle



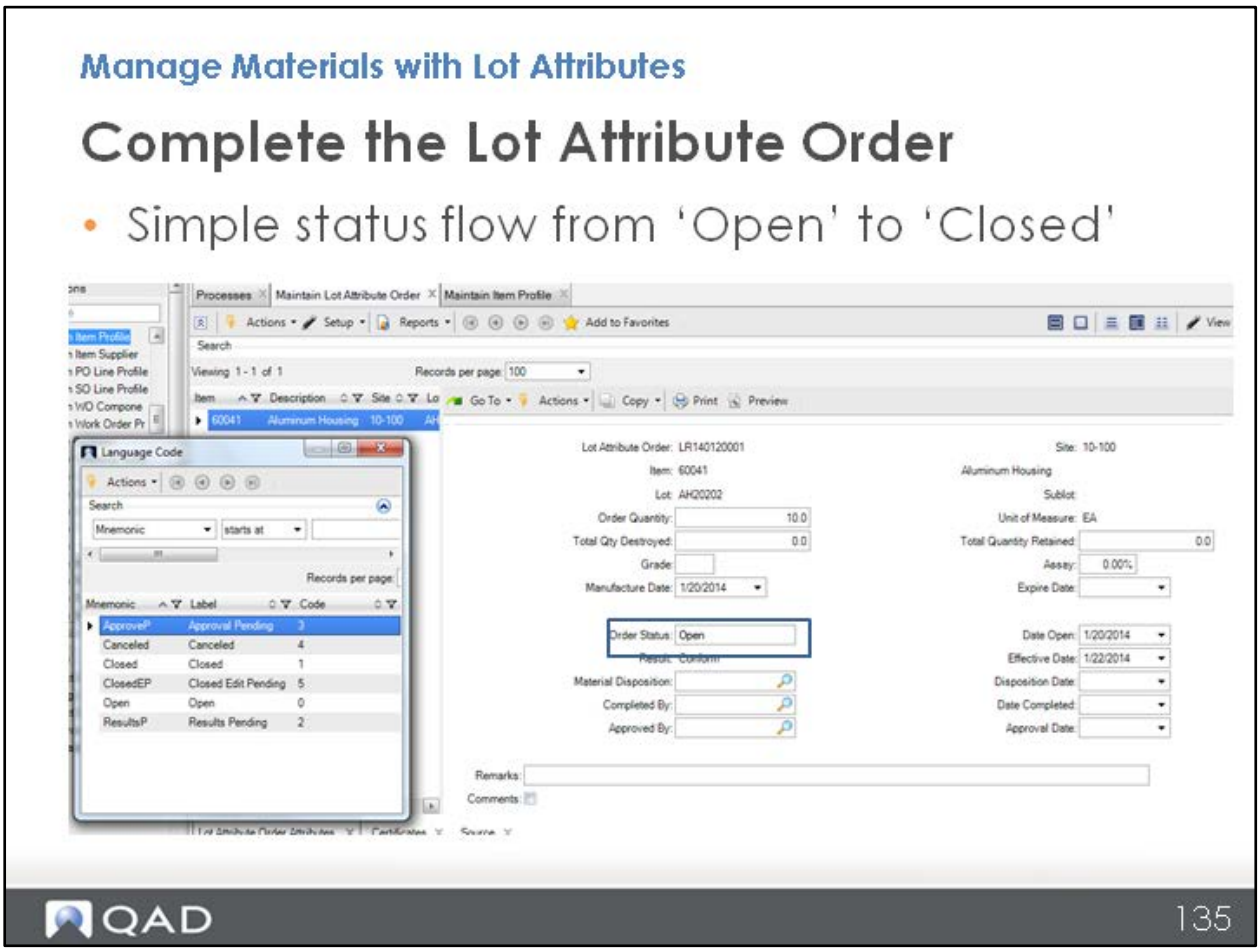
Each lot attribute order has an Order Status which determines its position in the workflow.

The following statuses are available:

- **Open**. The default status when the order is created. When the status is Open, subsequent receipts for the same item and lot will increment the order quantity for the Lot Attribute Order. The status can be changed from Open to Results Pending, Approval Pending, Closed, or Cancelled.
- **Results Pending**. You can optionally change the status to Results Pending when the entire lot quantity has been received. When the status is Results Pending, the Order Quantity is not automatically updated by subsequent receipts for the item and lot.
- **Approval Pending.** You can optionally change the status to Approval Pending after the order results and the attribute values and results for the lot attribute order have been recorded. When the status is Approval Pending, attribute values cannot be modified and the Order Quantity is not automatically updated by subsequent receipts for the item and lot.
- **Cancelled.** Change the status to Cancelled when the lot attribute order is not required and will not be completed. Once cancelled, an order cannot be re-opened.

- **Closed**. Change the status to Closed when the order results and its attribute results are final. When the status is changed to Closed, transactions are processed to scrap the quantity destroyed, transfer the quantity retained, and optionally transfer the remaining quantity or update its inventory status. You cannot set closed orders to any other status and you cannot edit the values in their fields.
- **Closed Edit Pending.** The status that is assigned by the system when an administrator edits a closed order using the Edit Closed Lot Attribute Order function. Using that function the status can then be changed back to Closed.

Complete the Lot Attribute Order



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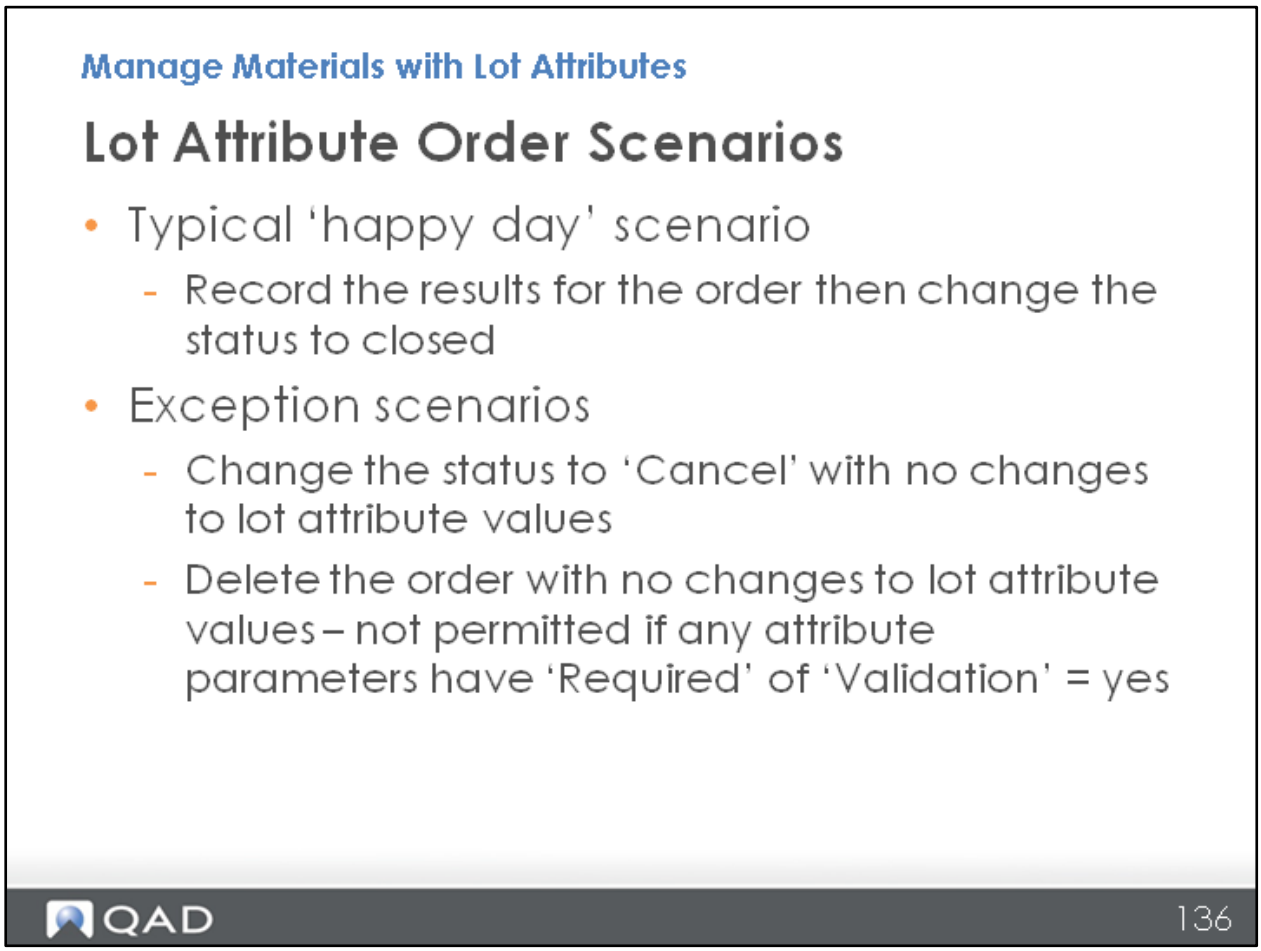
Lot Attribute Order Scenarios



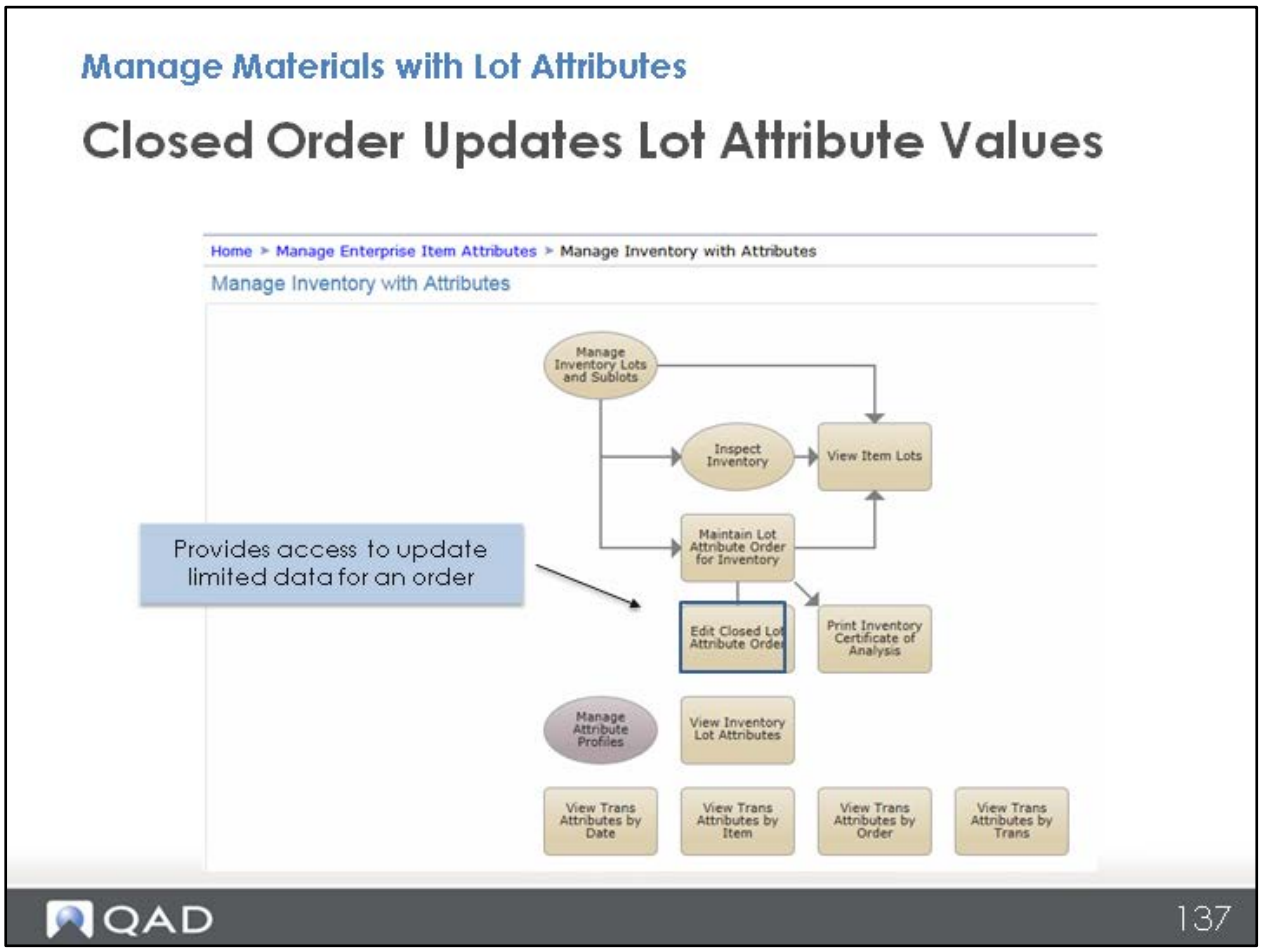
The three most common ways to handle an open lot attribute order are to close it, cancel it, or delete it. Each has a specific purpose within most workflows.

The most common is to record the results of the order and close it. You have already covered this within the guide.

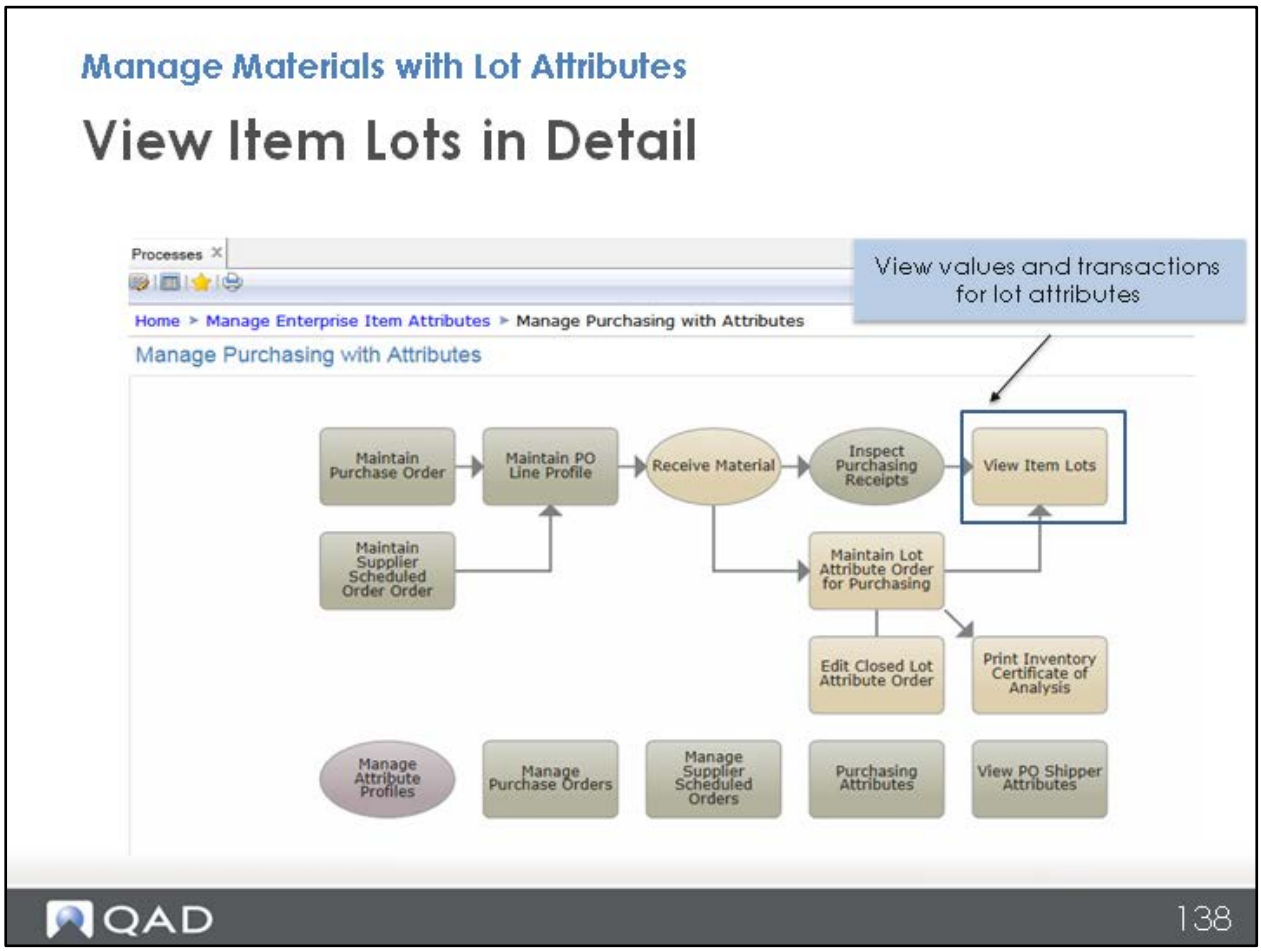
Next, you may have to cancel the lot attribute order. This is appropriate when the lot attribute order would is no longer helpful, but is still incomplete. A record of the cancelled order remains in the system.

Finally, you may need to delete a lot attribute order. This is helpful when an order is redundant or improperly created. Deleting an order is useful when you need to end an order, but leaving a record of a cancelled order would be confusing.

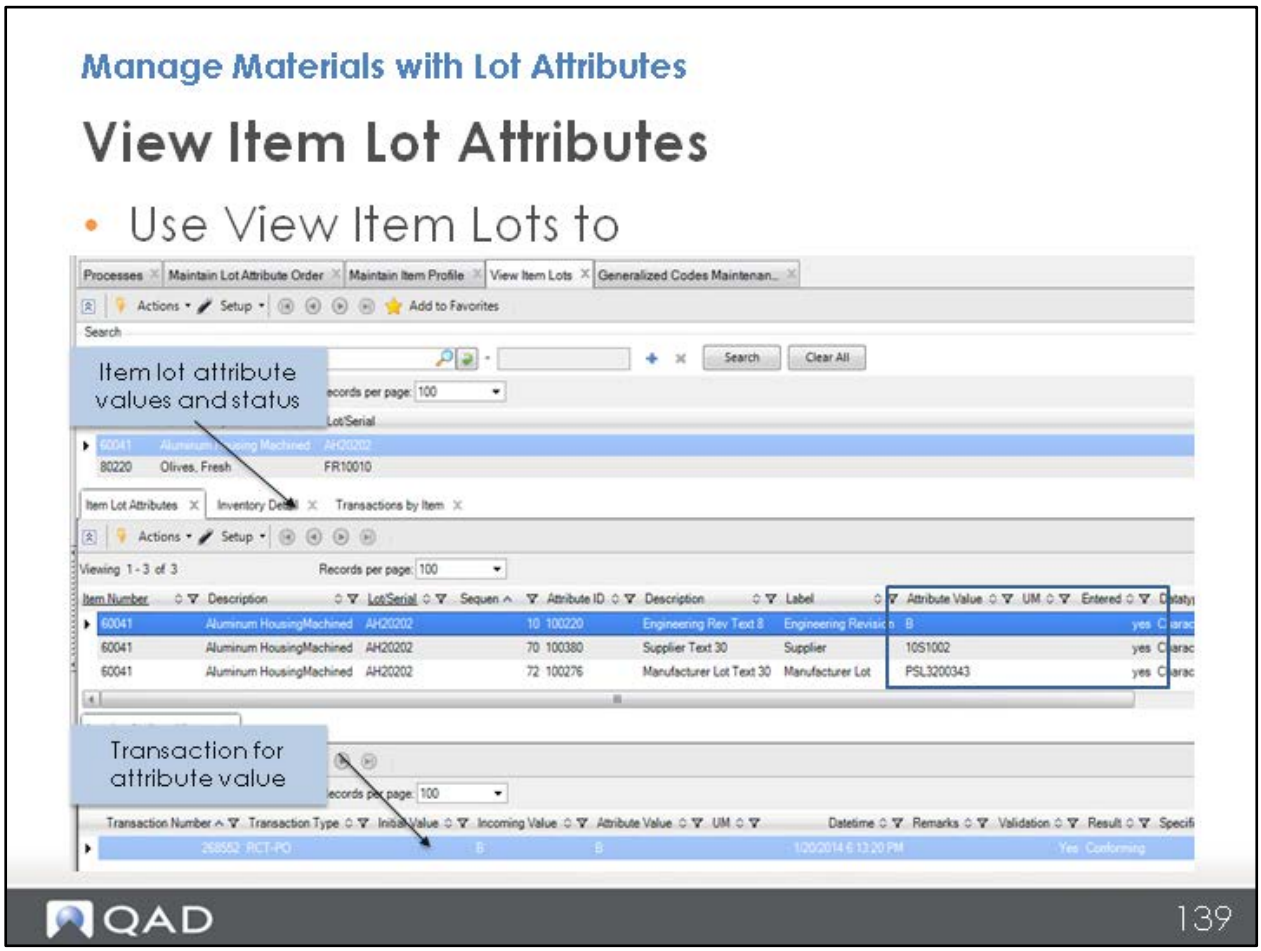
Closed Order Updates Lot Attribute Values



View Item Lots in Detail



View Item Lot Attributes

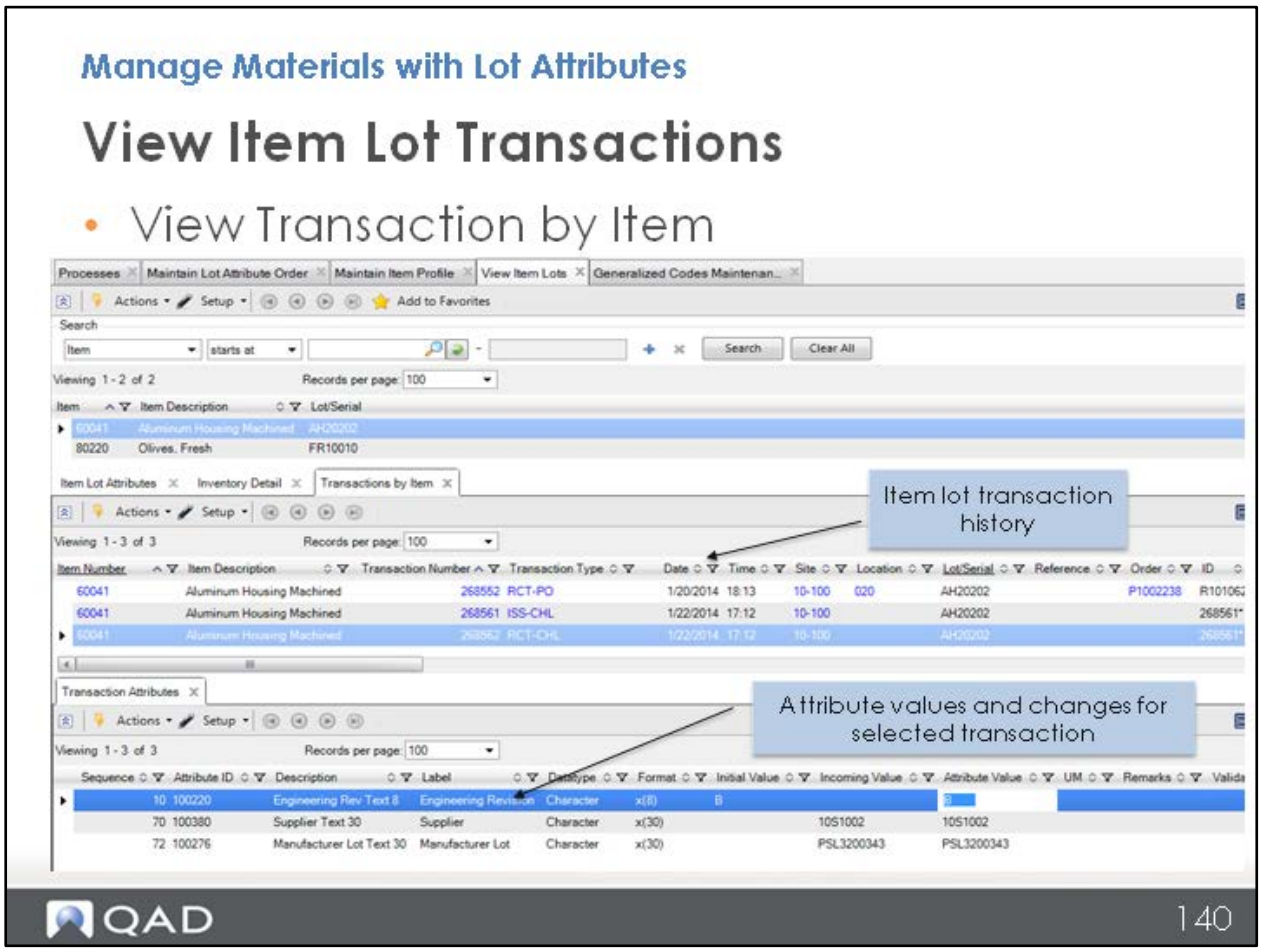


When you close a lot attribute order, it completes the update process.

The attributes of the associated item lot update to reflect the results of the lot attribute order.

Use View Item Lots to view and monitor changes to lot attribute values.

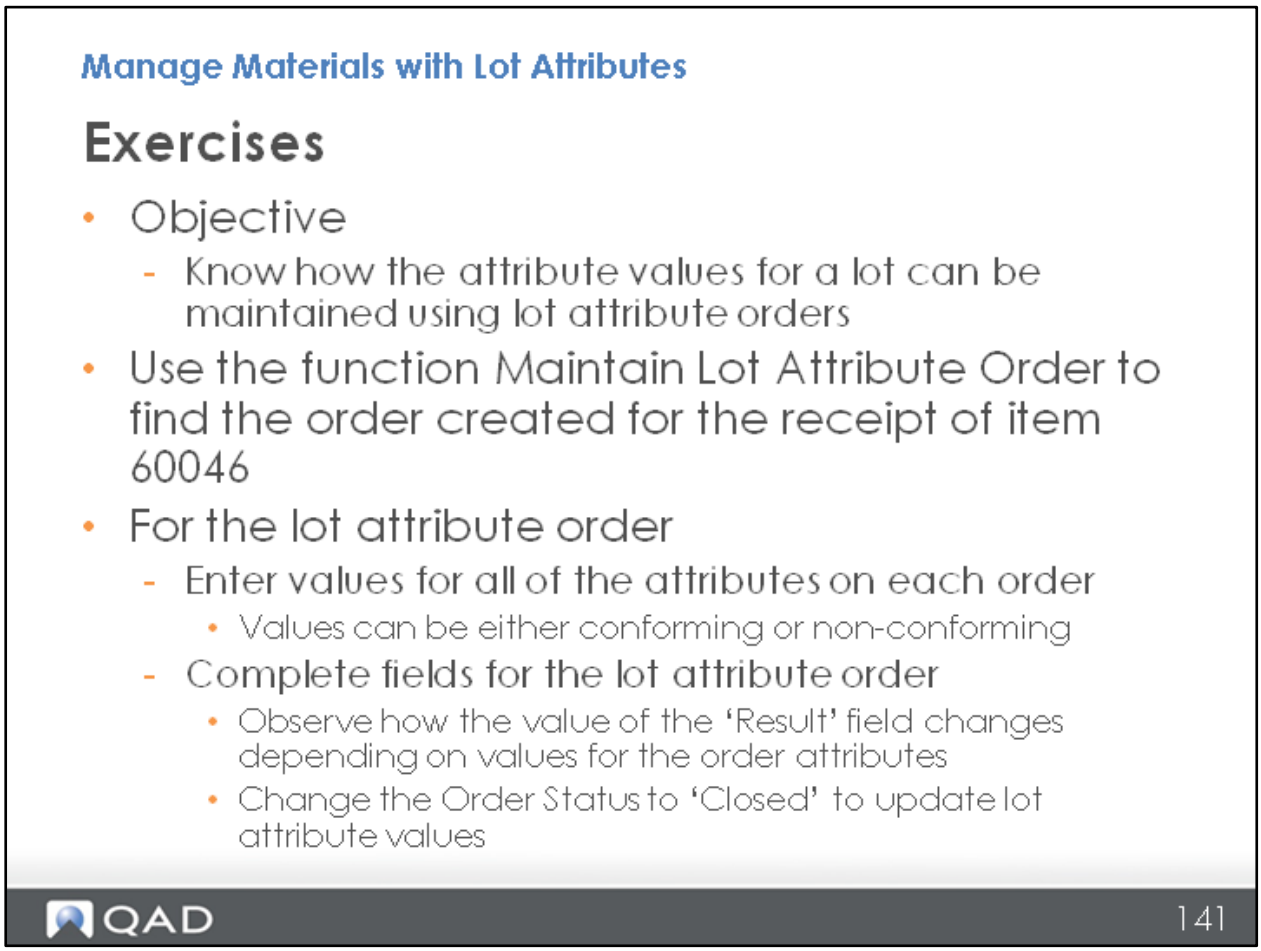
View Item Lot Transactions



You can reenter values for open lot attributes. To do so, access the modify function for the attribute. Enter a new value in place of the existing value and save the attribute.

Each time you edit the order or its attributes, another history entry is added to the third level Transaction Attributes tab. You can view changes to attribute values for transactions here.

Exercises


Manage Materials with Lot Attributes
Exercises
Objective
Know how the attribute values for a lot can be maintained using lot attribute orders
Use the function Maintain Lot Attribute Order to find the order created for the receipt of item 60046
For the lot attribute order
Enter values for all of the attributes on each order
Values can be either conforming or non-conforming
Complete fields for the lot attribute order
Observe how the value of the 'Result' field changes depending on values for the order attributes
Change the Order Status to 'Closed' to update lot attribute values
QAD
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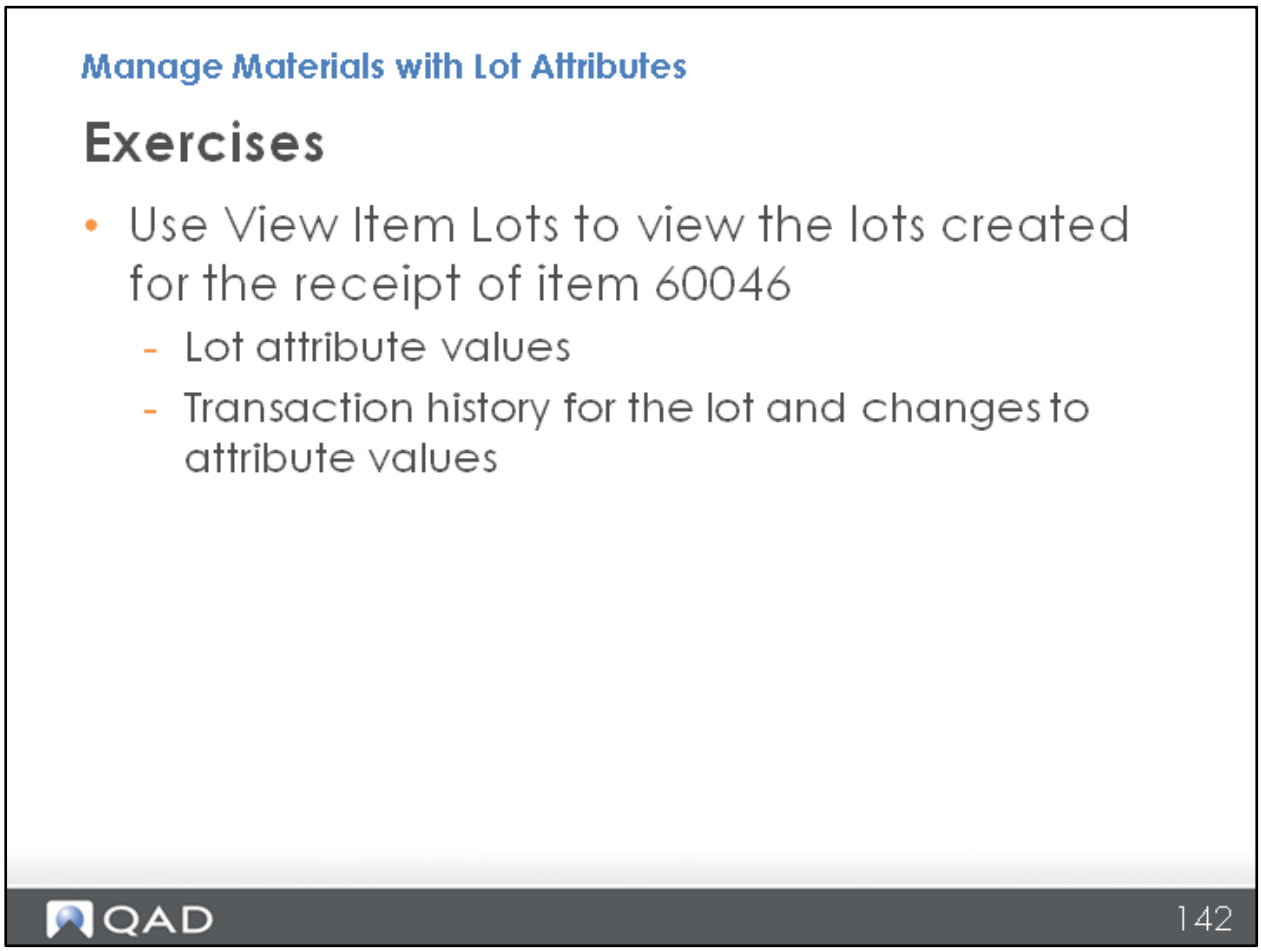
Exercises


Manage Materials with Lot Attributes
Exercises
• Use View Item Lots to view the lots created for the receipt of item 60046
- Lot attribute values
- Transaction history for the lot and changes to attribute values
QAD
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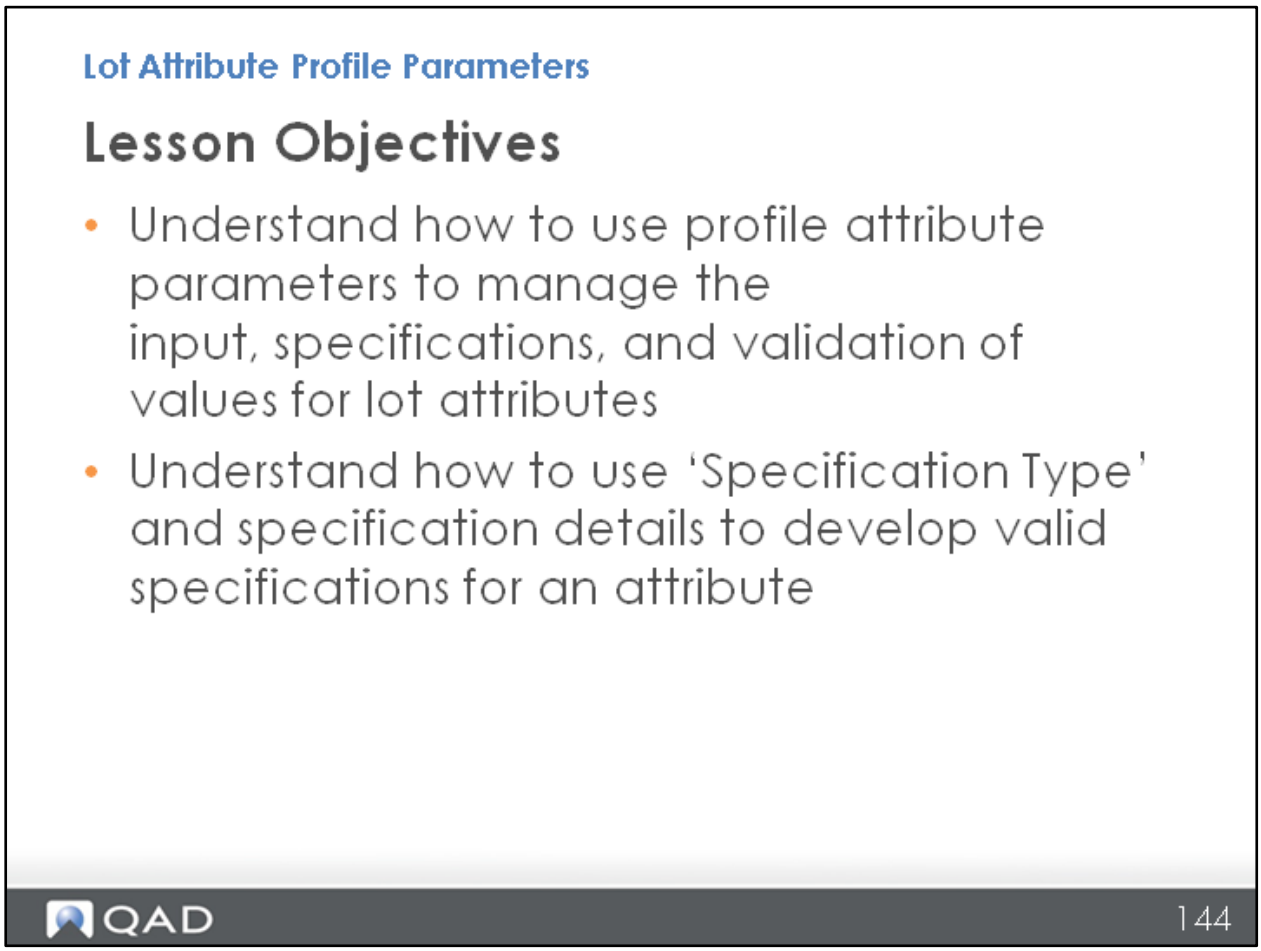
CHAPTER 7

Lot Attribute Profile Parameters

Lot Attribute Profile Parameters

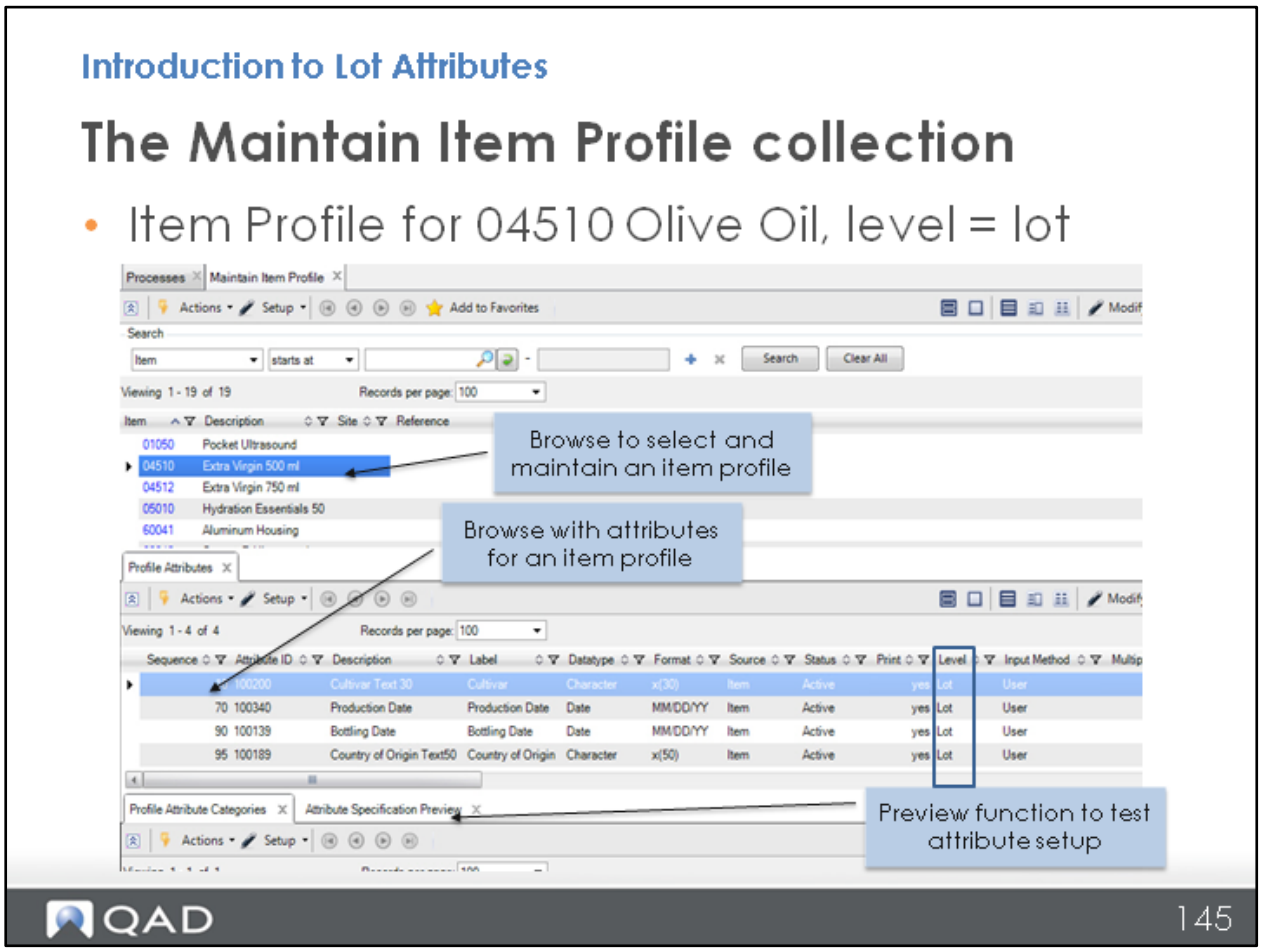
Lesson Objectives



At the end of this section of training, you will understand the different parameters that make up lot attributes.

In learning this, you will understand how to use the different parameter and specification options. This allows you to usefully define item traits using attributes.

The Maintain Item Profile collection

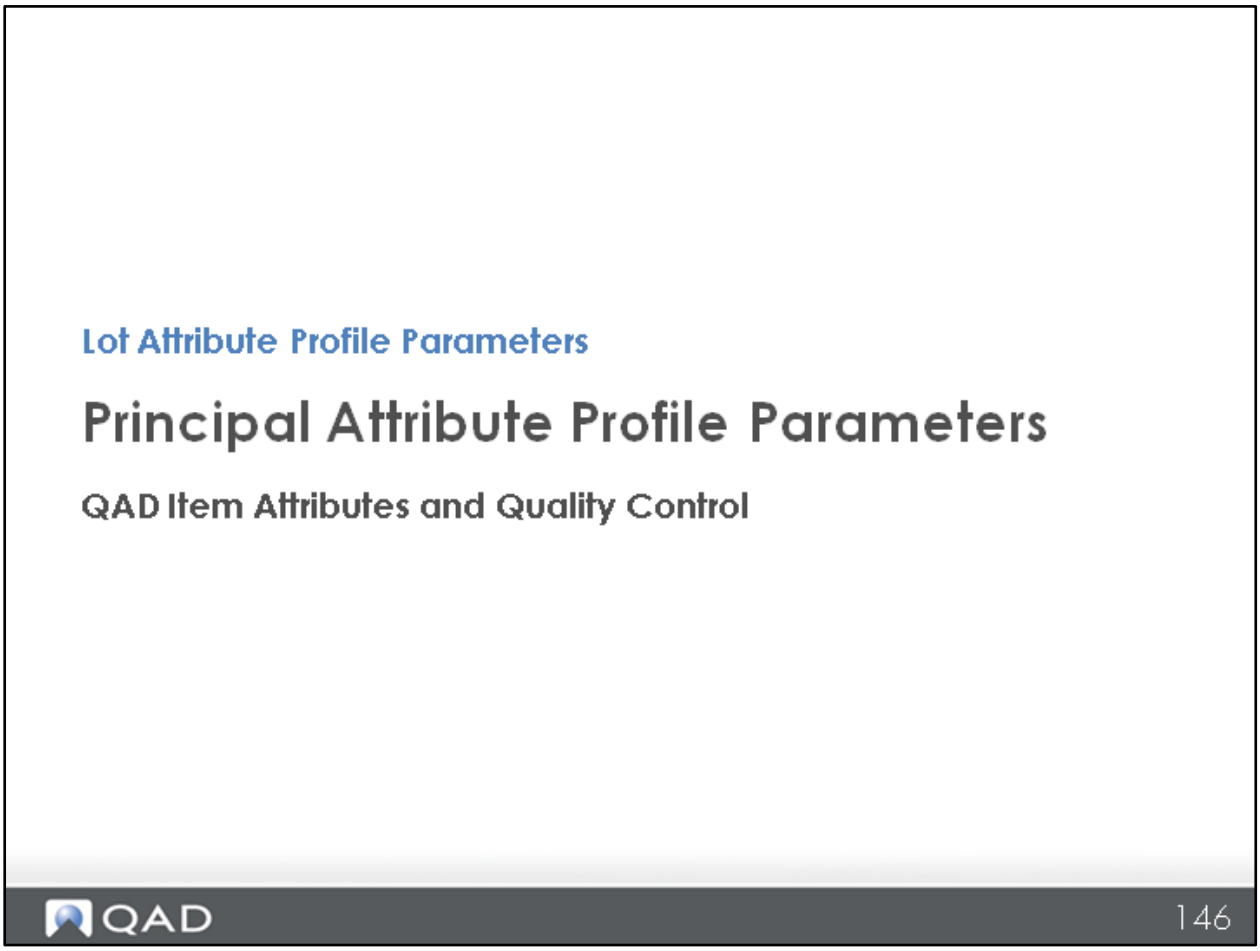


The Maintain Item Profile browse collection allows you to create, modify, and view item profiles.

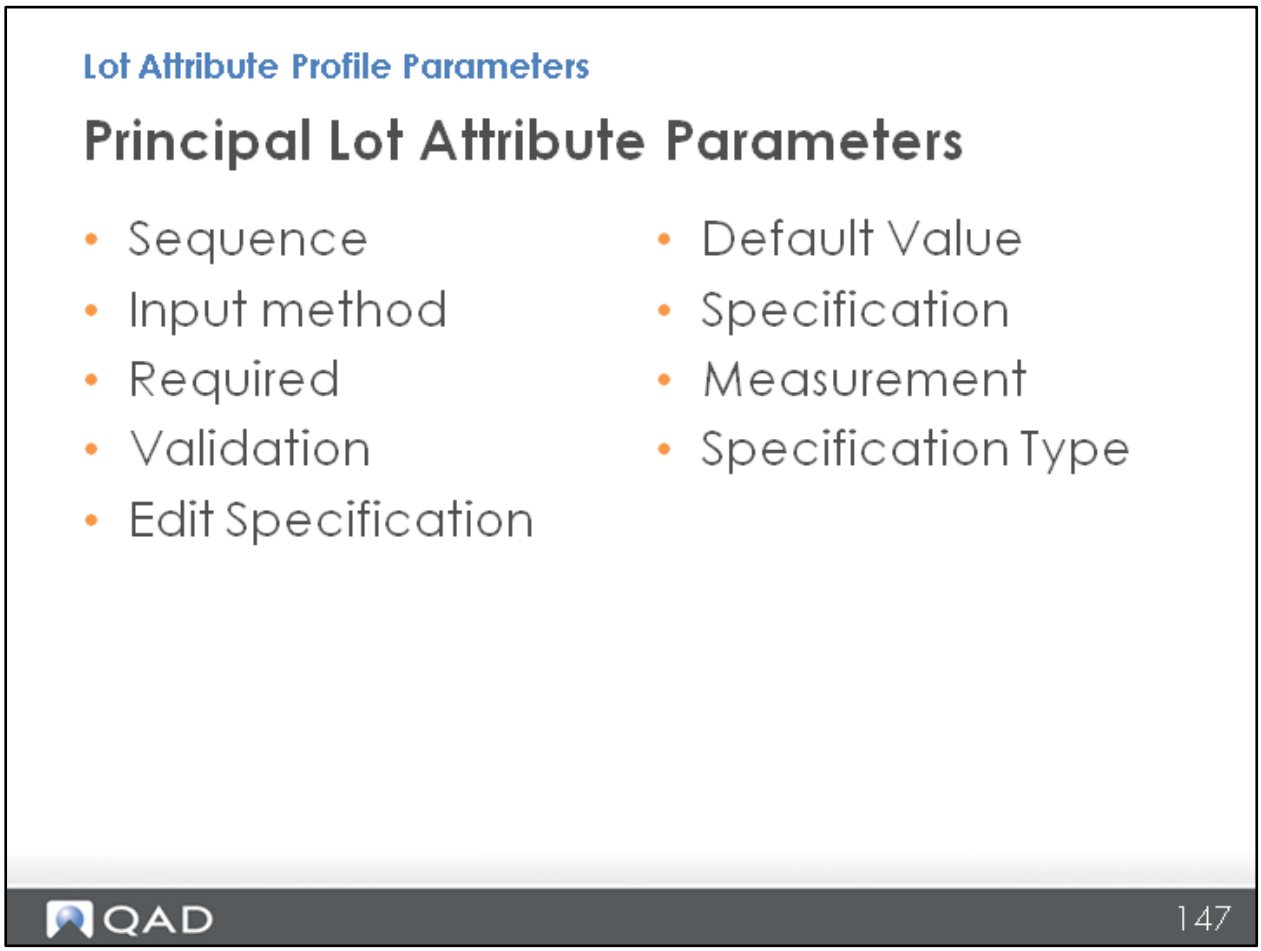
The second level Profile Attributes tab within the browse collection stores information on the attributes associated with each profile.

In the picture above, you can see the profile attributes associated with the selected item profile.

Principal Attribute Profile Parameters

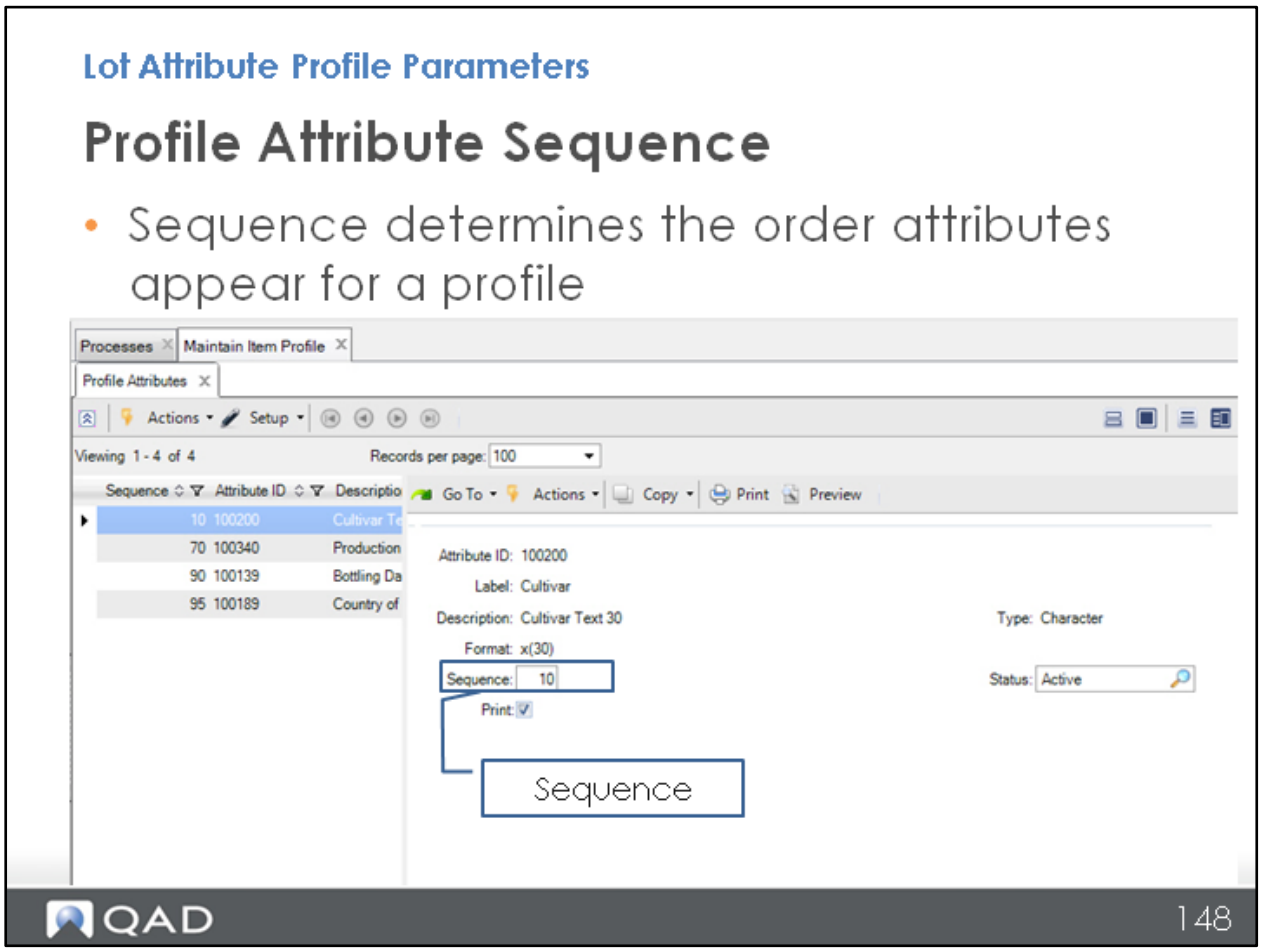


Principal Lot Attribute Parameters



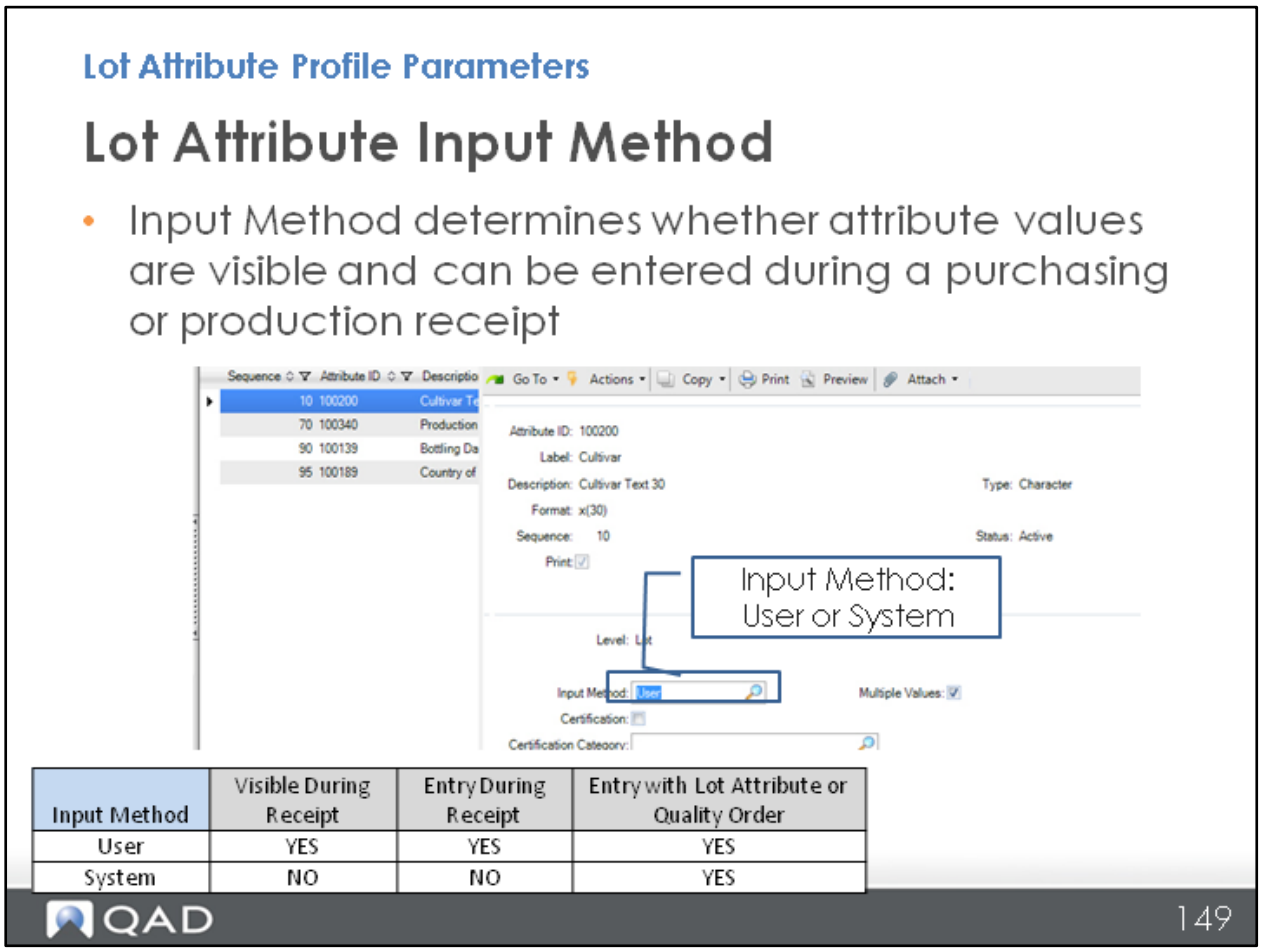
The settings for these parameters should be based on a good understanding of requirements and detailed analysis of how attribute values need to be evaluated.

Profile Attribute Sequence



All profiles attributes have a sequence. This determines the order in which attributes print on reports.

Lot Attribute Input Method

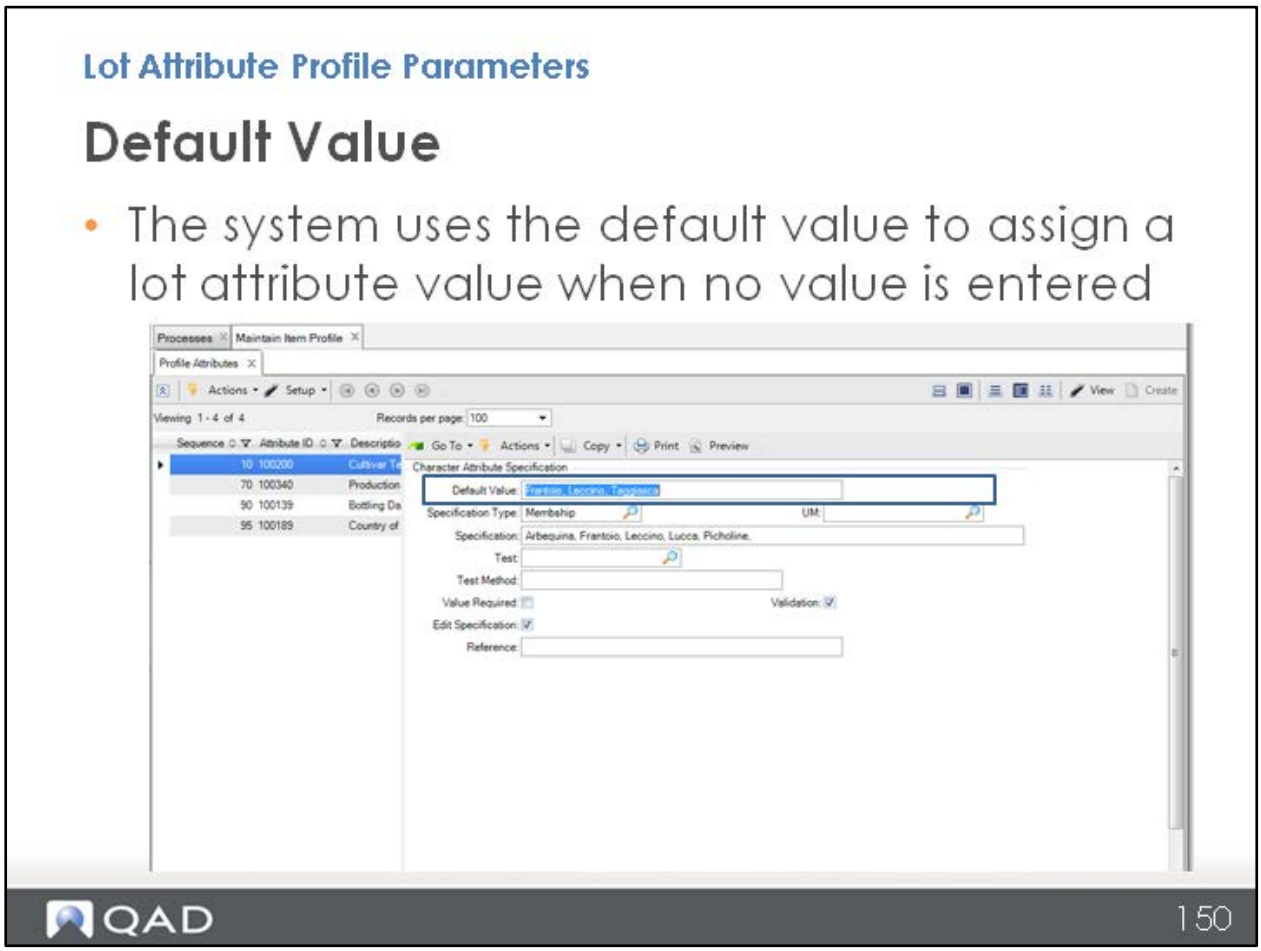


The lot attribute input method determines how the values are provided for the attribute.

The valid options here are User and System

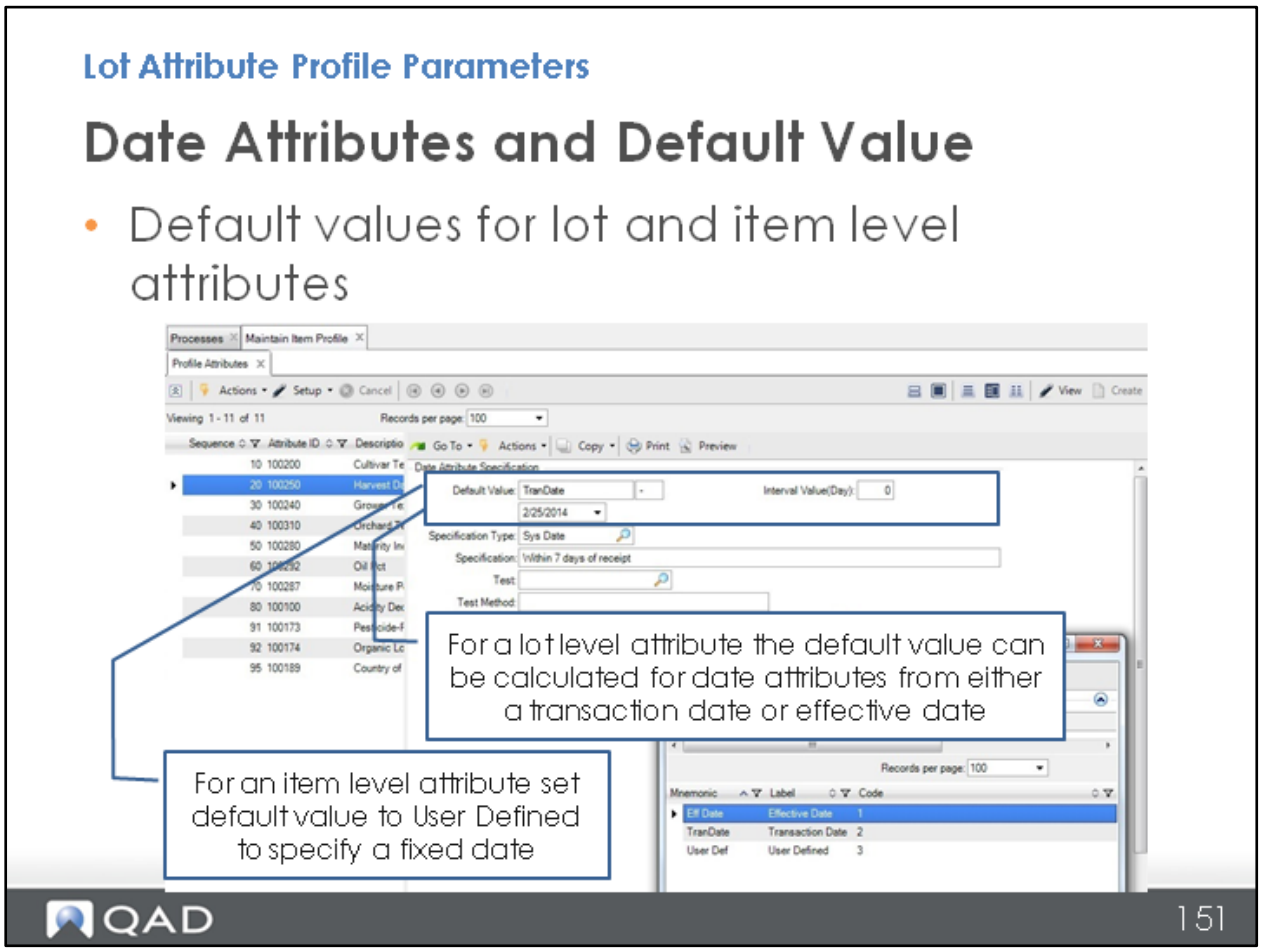
All lot level and sublot level attribute can be entered using a lot attribute or quality order

Default Value



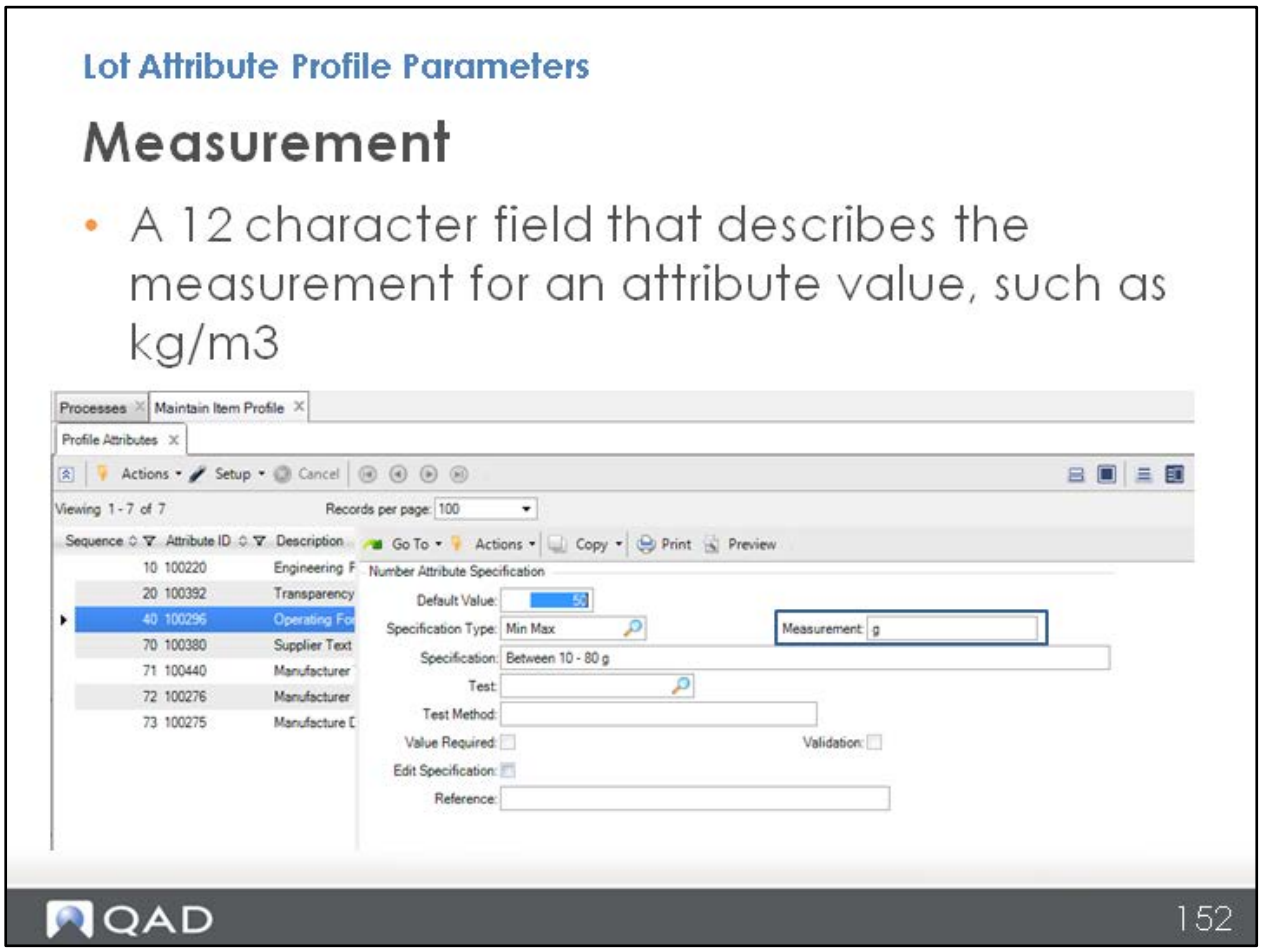
Each lot attribute has a Default Value. This is the value that the system gives to the attribute if no value is given by a user.

Date Attributes and Default Value



Each lot attribute has a Default Value. This is the value that the system gives to the attribute if no value is given by a user.

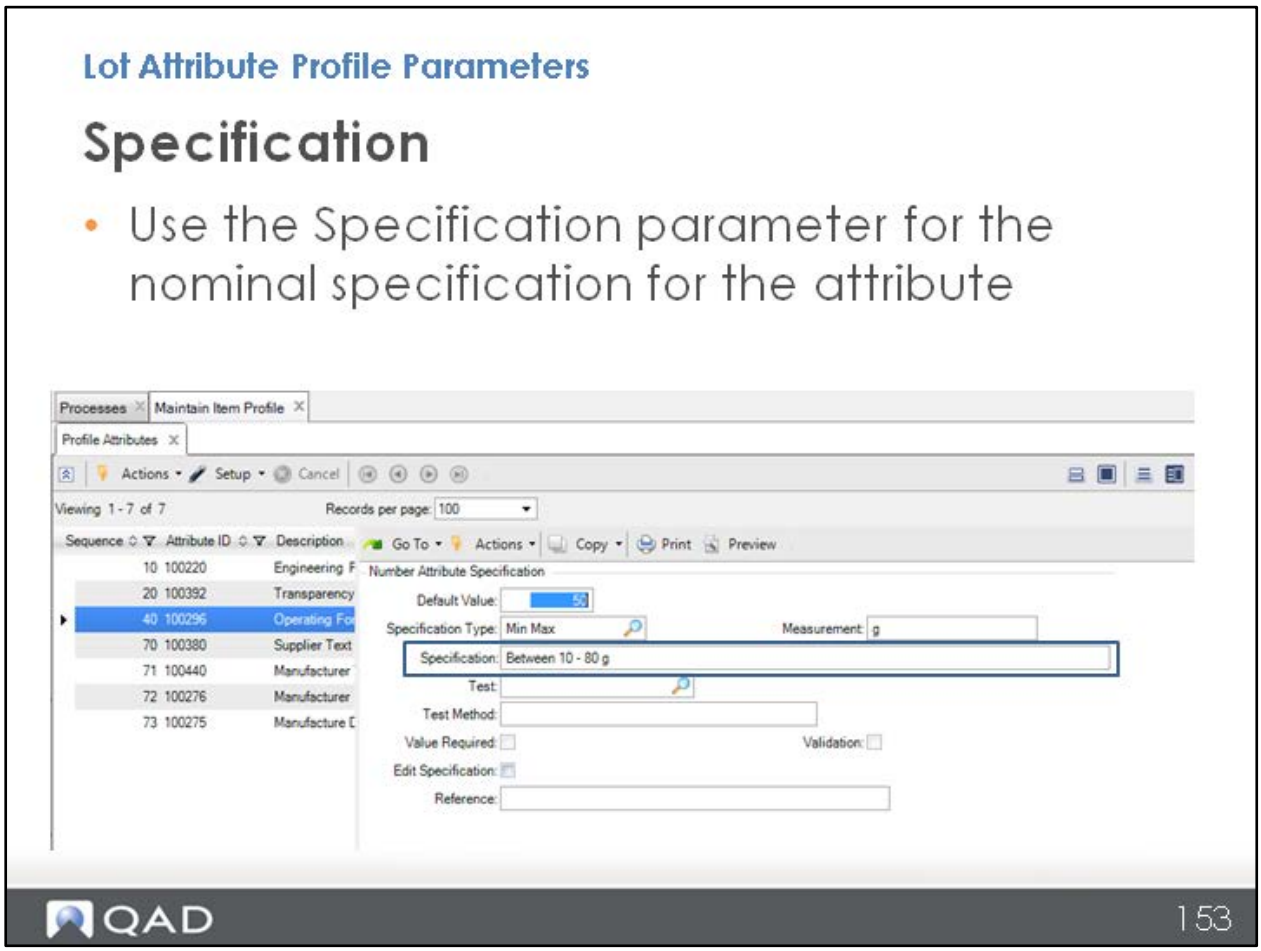
Measurement



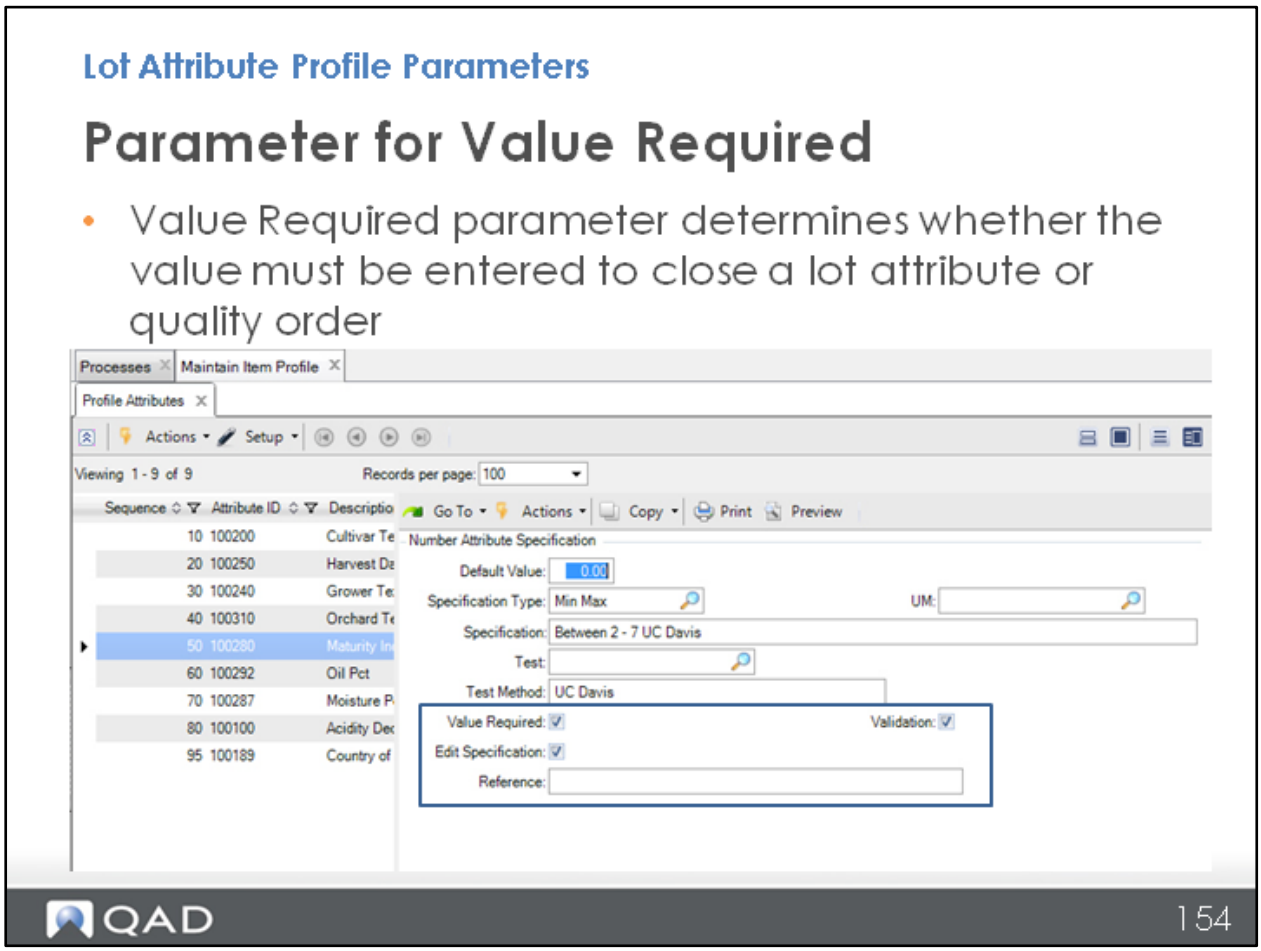
Measurement is the inspection or test measurement for the attribute. The purpose for this parameter is to store a short description of how the attribute value is measured.

Measurement does not apply for date and logical attributes.

Specification

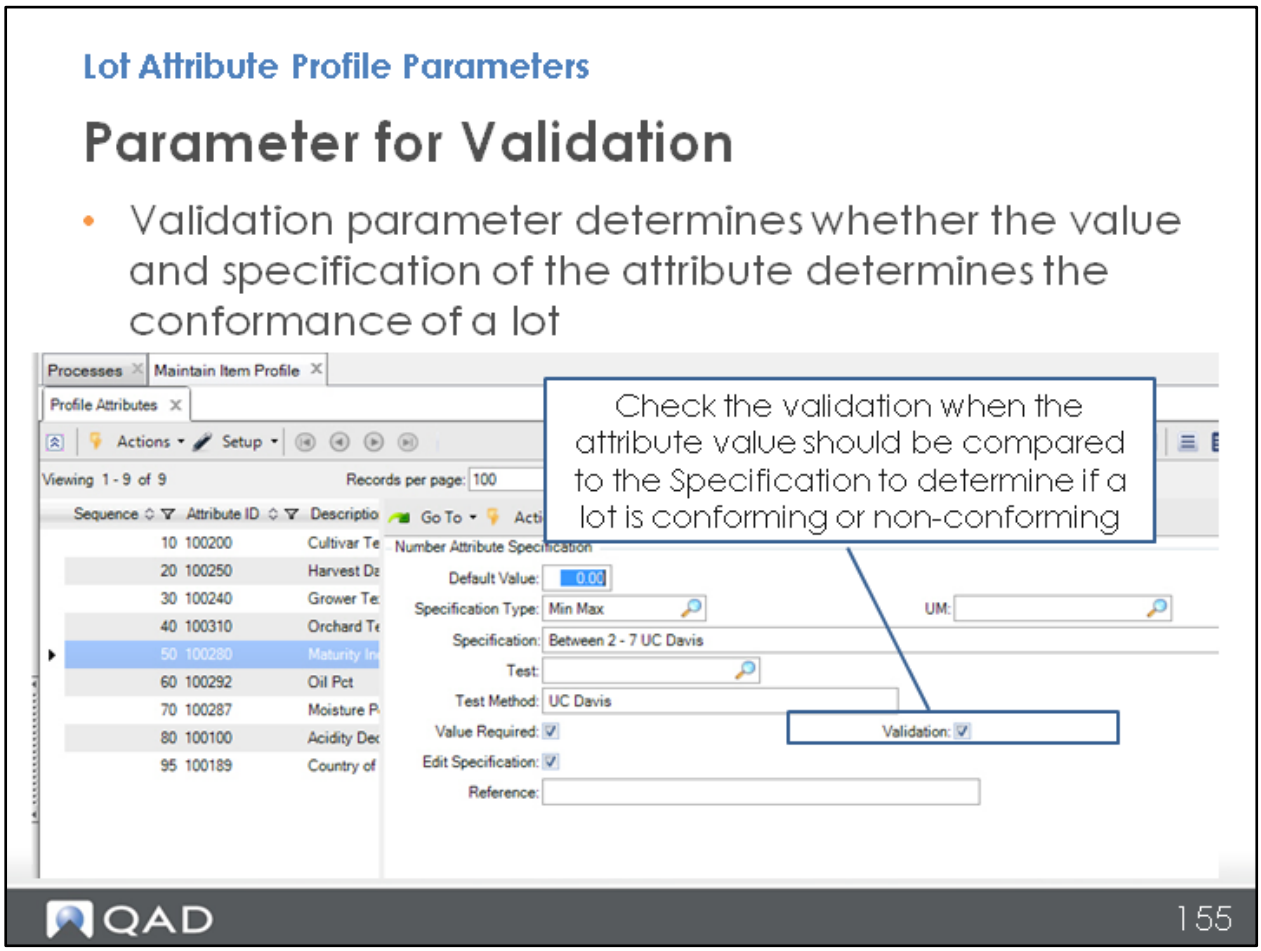


Parameter for Value Required



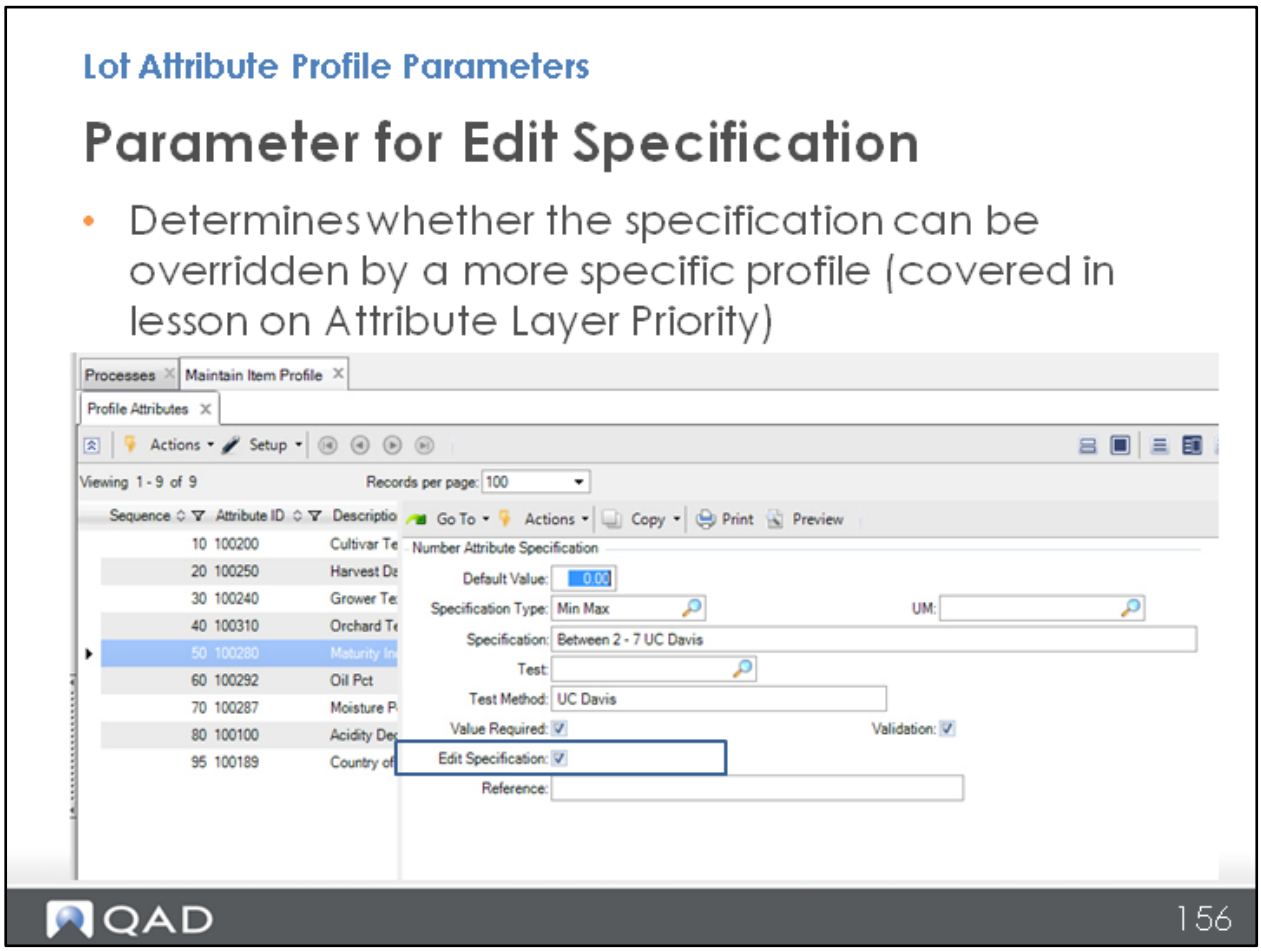
The Value Required parameter determines whether the value must be entered before closing a lot attribute or quality order.

Parameter for Validation



The Validation parameter determines whether the system checks the value for conformance.

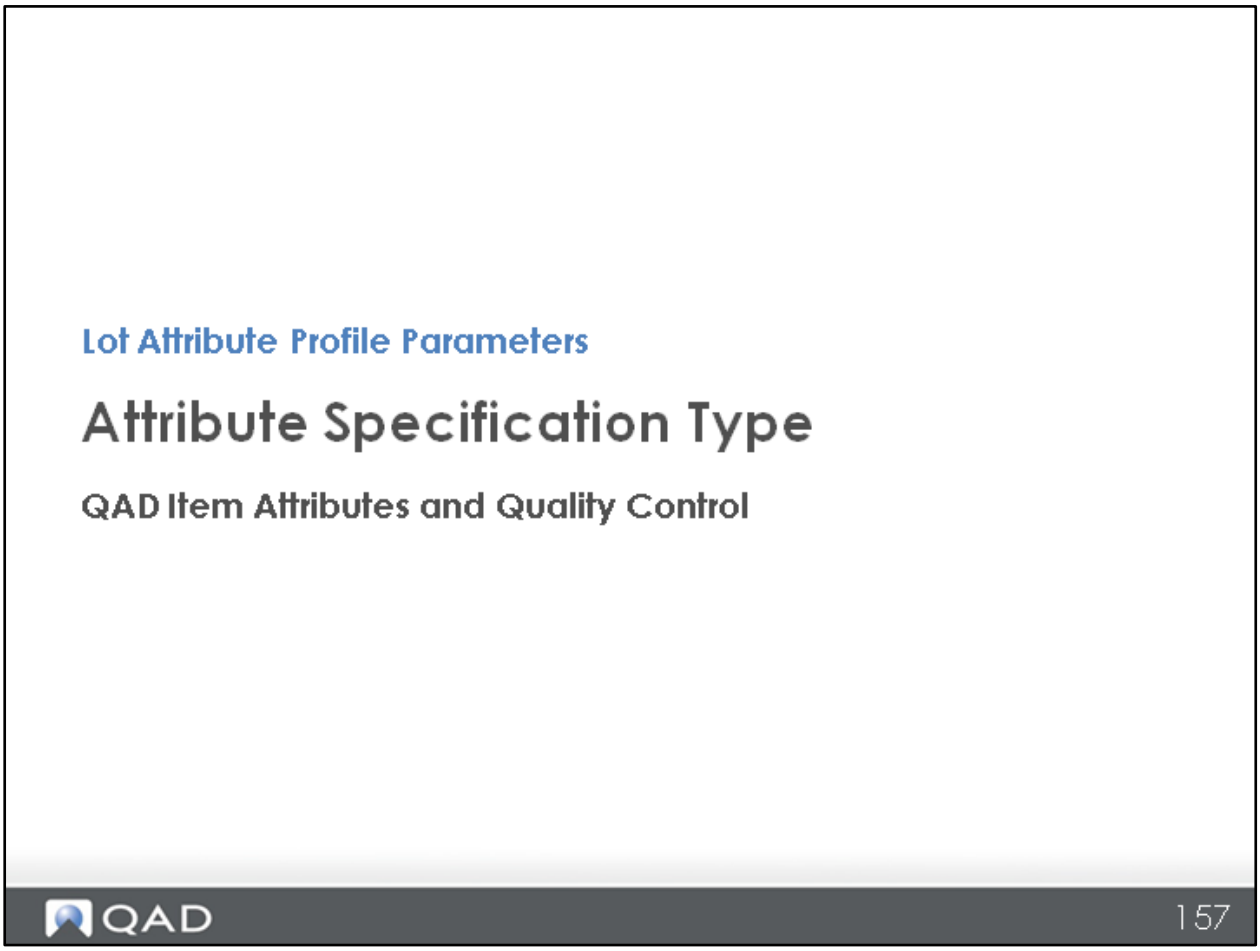
Parameter for Edit Specification



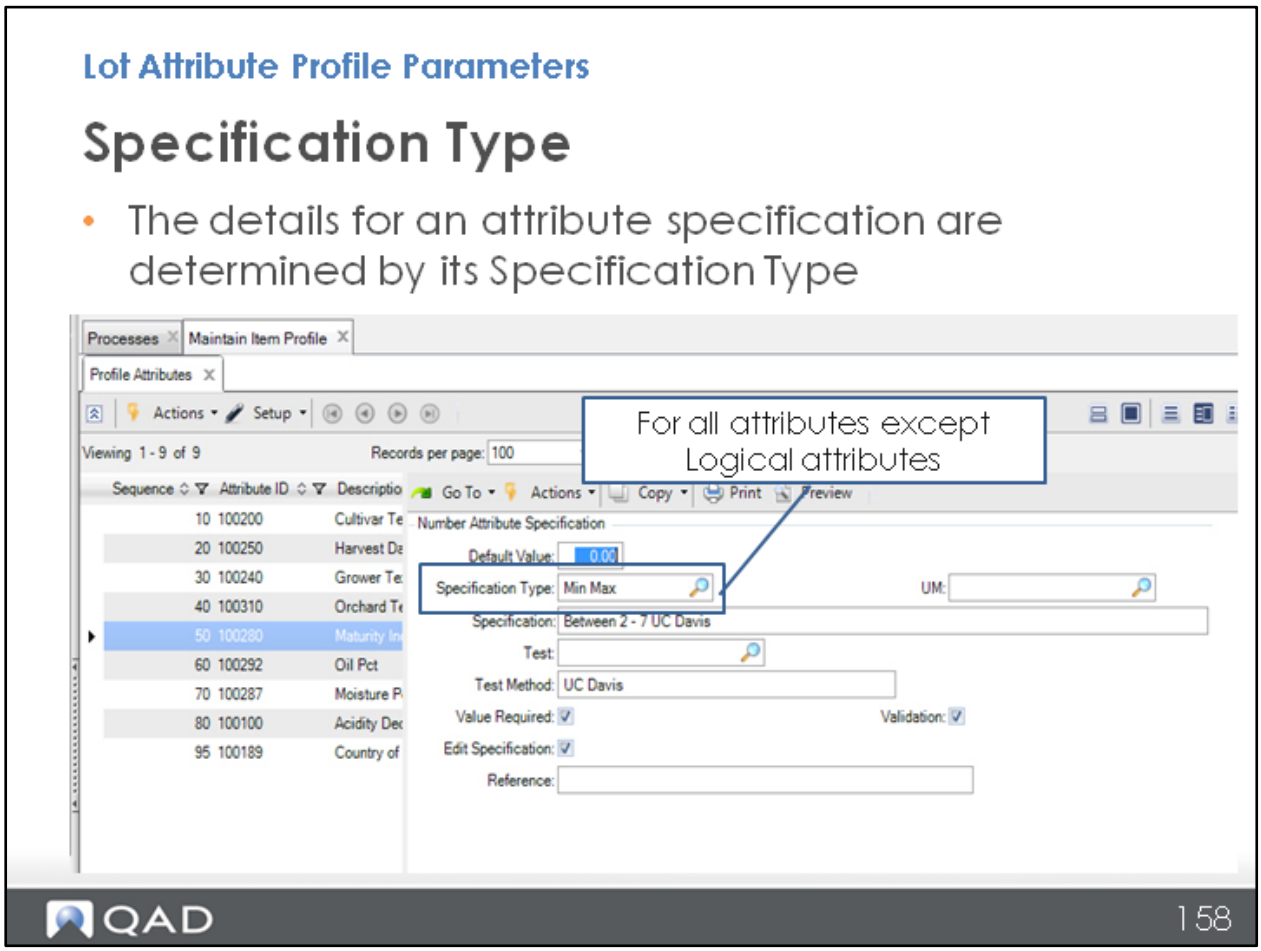
If Edit Specification is not checked, then a more specific, higher level profile cannot override the specification for this profile attribute

If Edit Specification is checked, then a more specific, higher level profile can override the specification for this profile attribute

Attribute Specification Type



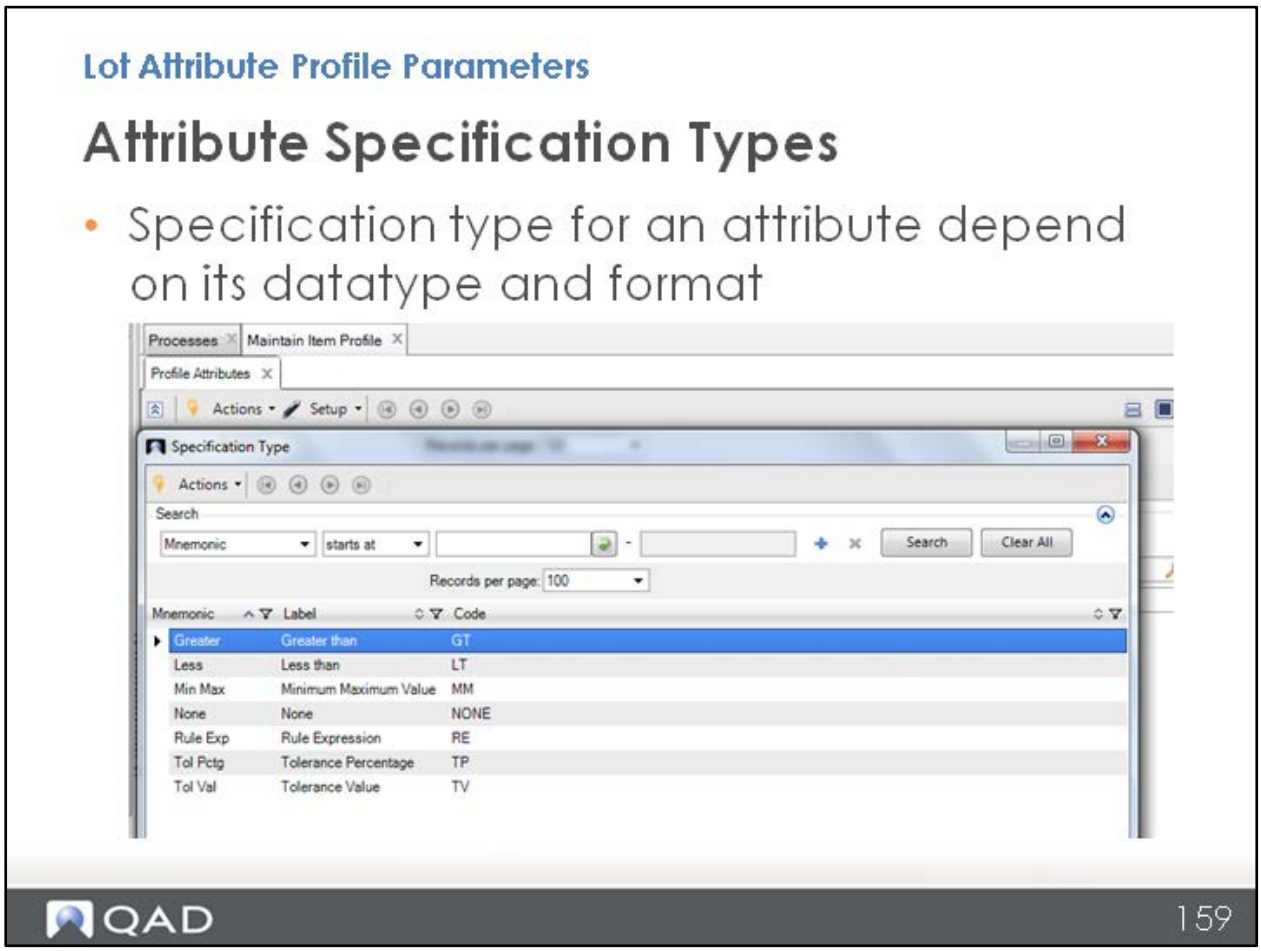
Specification Type



The Edit Specification parameter determines profile priority.

If Edit Specification is checked, then profiles will override test specifications when the profile is more specific.

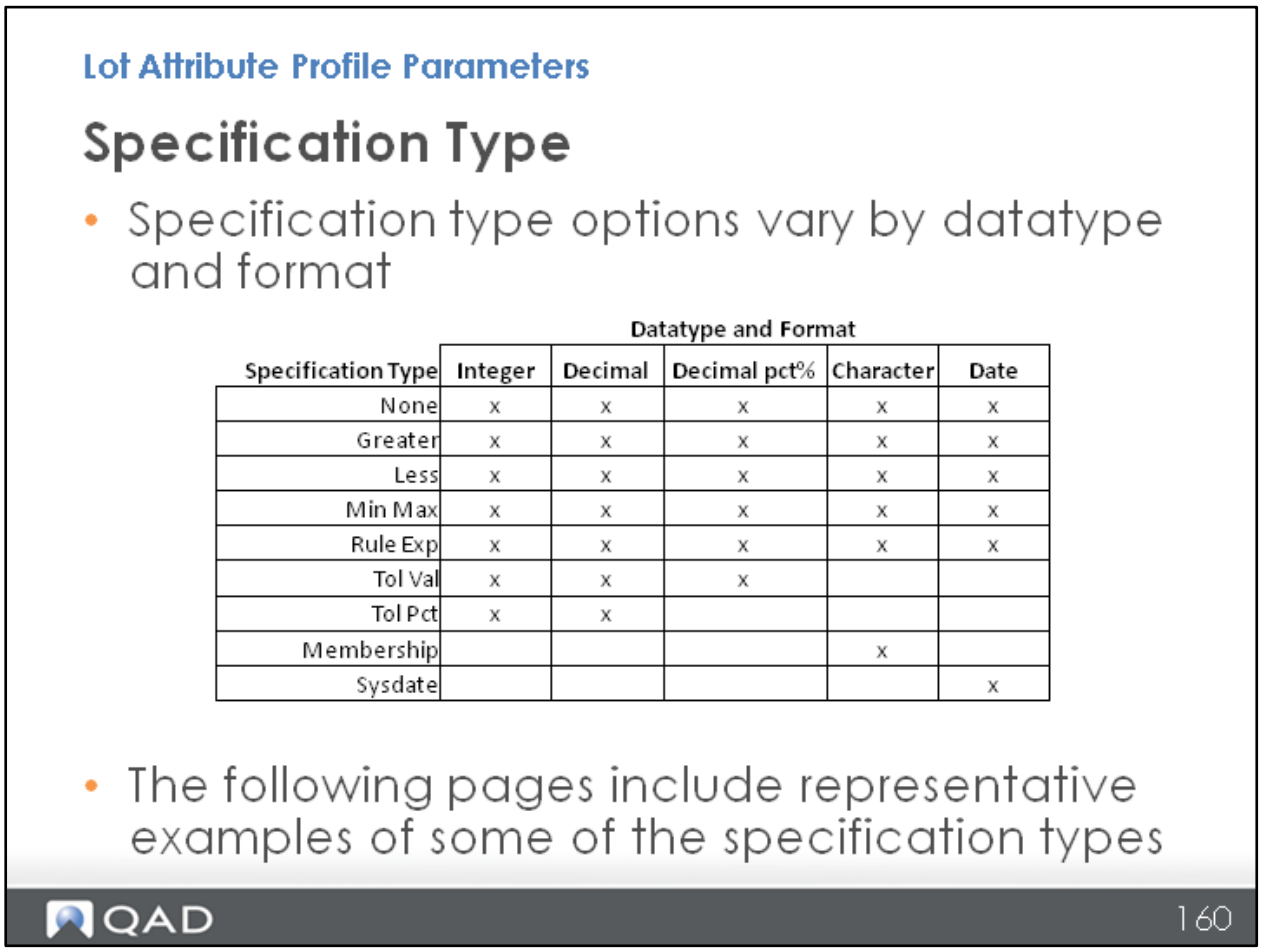
Attribute Specification Types



A lot attribute's specification type determines how the system validates an attribute for conformance. The types of specifications that are available depend on what type of datatype and format that the lot attribute uses.

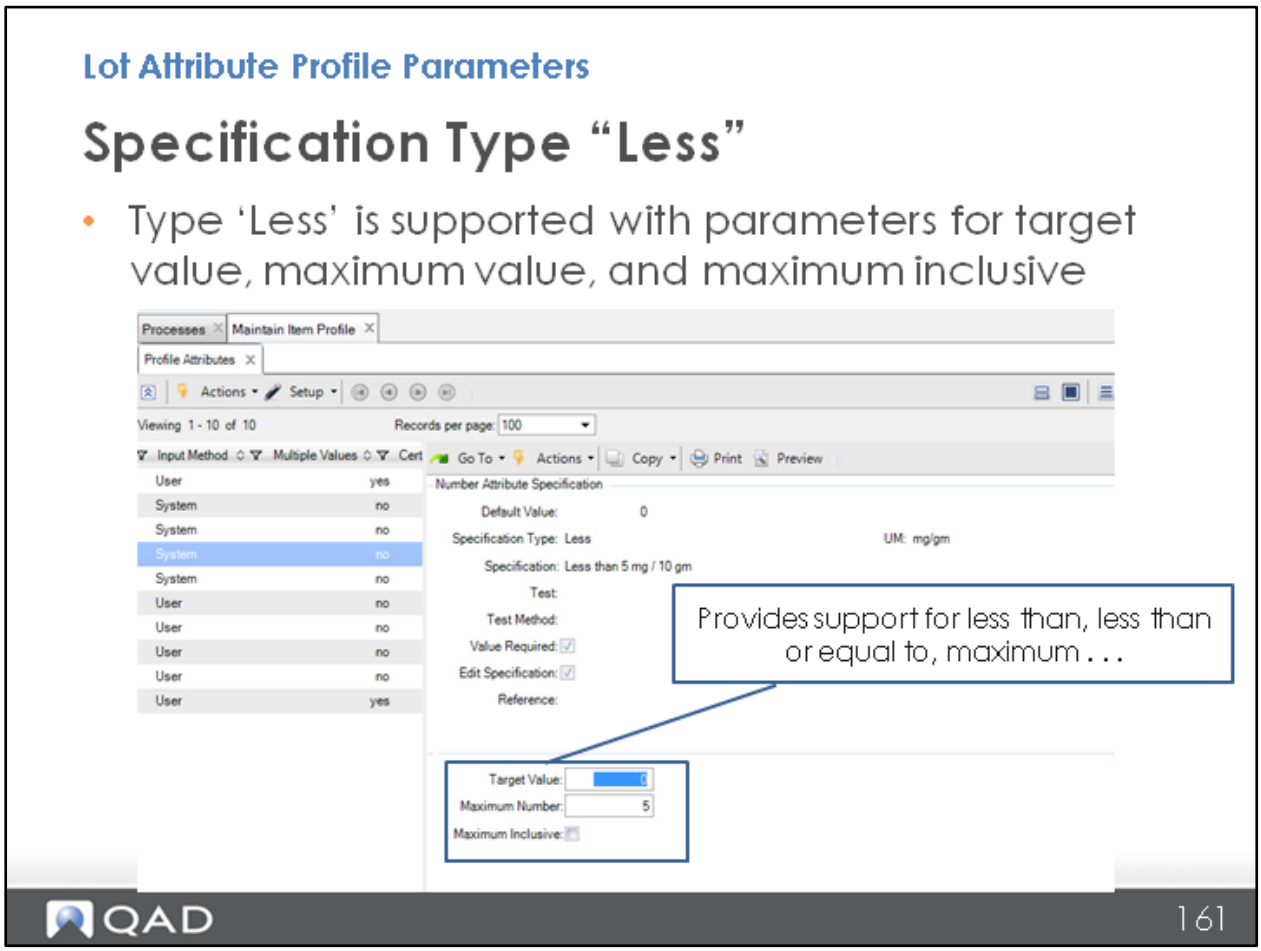
Leave the specification type parameter as 'None' when there is no specification

Specification Type



	Datatype and Format				
Specification Type	Integer	Decimal	Decimal pct%	Character	Date
None	x	x	x	x	x
Greater	x	x	x	x	x
Less	x	x	x	x	x
Min Max	x	x	x	x	x
Rule Exp	x	x	x	x	x
Tol Val	x	x	x		
Tol Pct	x	x			
Membership				x	
Sysdate					x

Specification Type “Less”

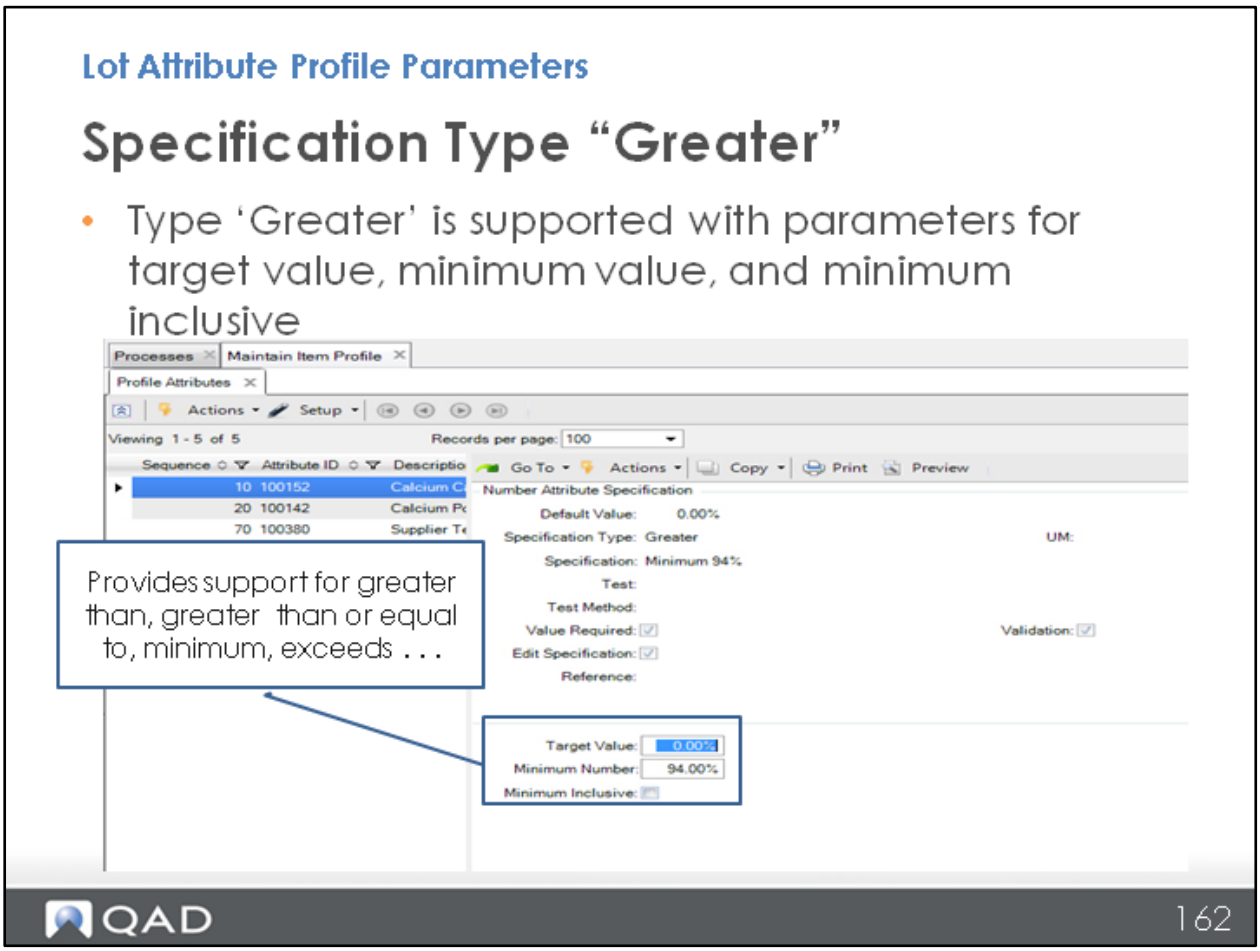


Specification parameters depend on the specification type that is used.

If the Specification Type is set to Less, then you can specify a maximum number and a target value.

The Maximum Inclusive option determines whether the maximum number is an acceptable value. If it is checked, then a value equal to the maximum is conforming.

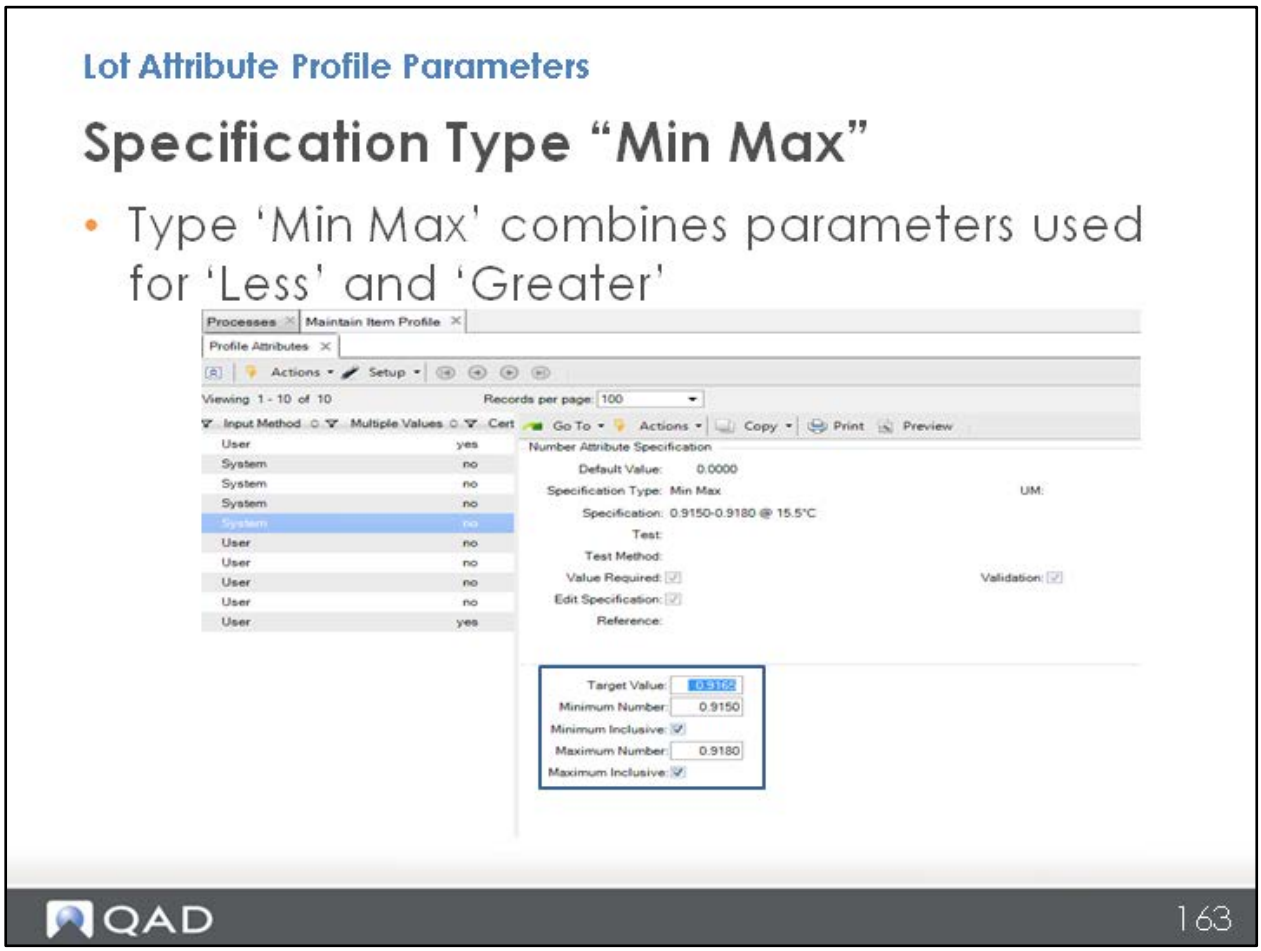
Specification Type “Greater”



The Greater specification type functions much like the Less specification type, except that it uses the opposite operation.

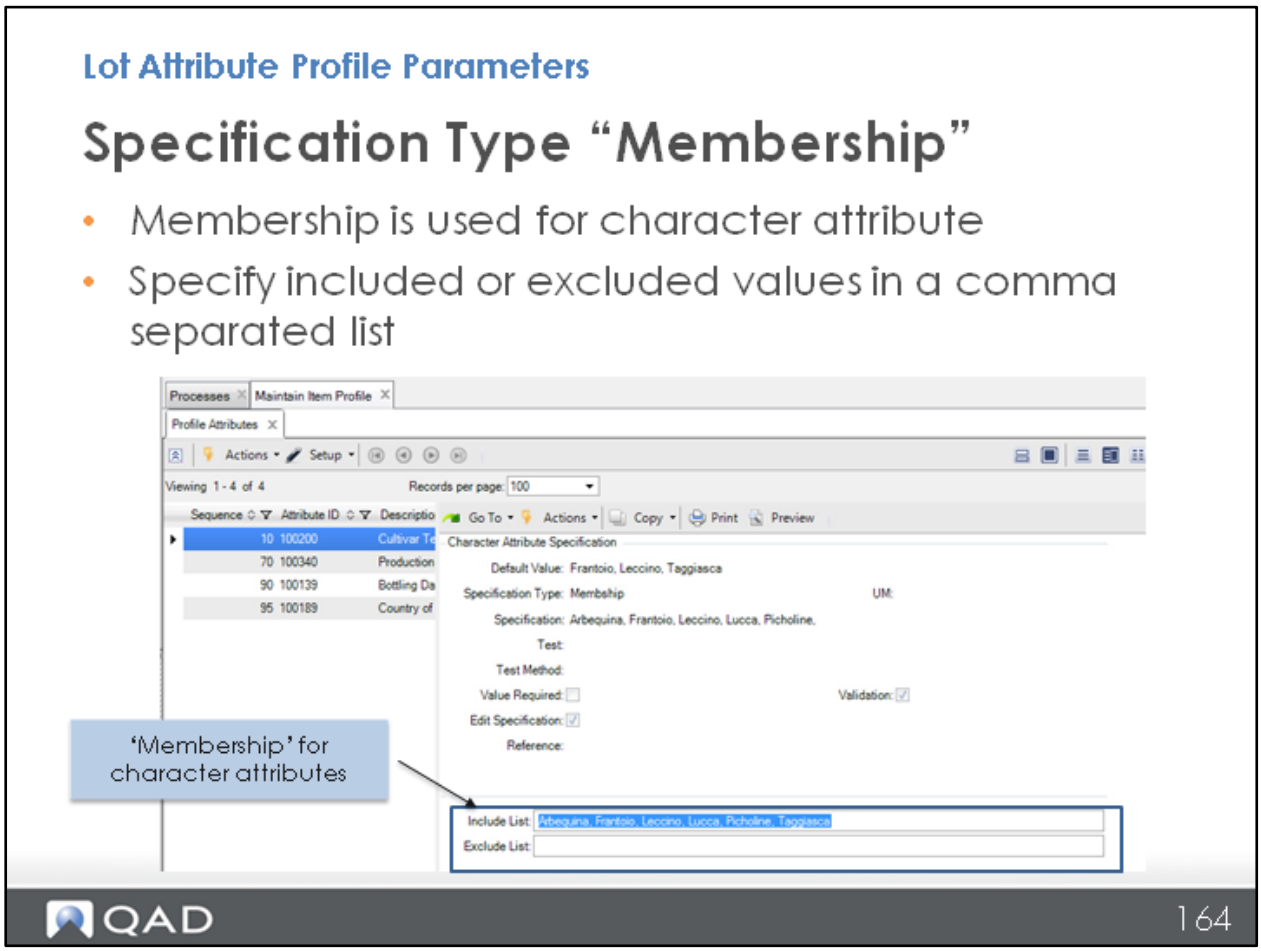
You must choose a Minimum Number and a Target Value. If you check Minimum Inclusive, a value which equals the Minimum Number is conforming.

Specification Type “Min Max”



The Min Max specification type combines both Less and Greater. In this type, you must specify a Minimum Number, a Maximum Number, and a Target Value. Both Minimum Inclusive and Maximum Inclusive are options.

Specification Type “Membership”

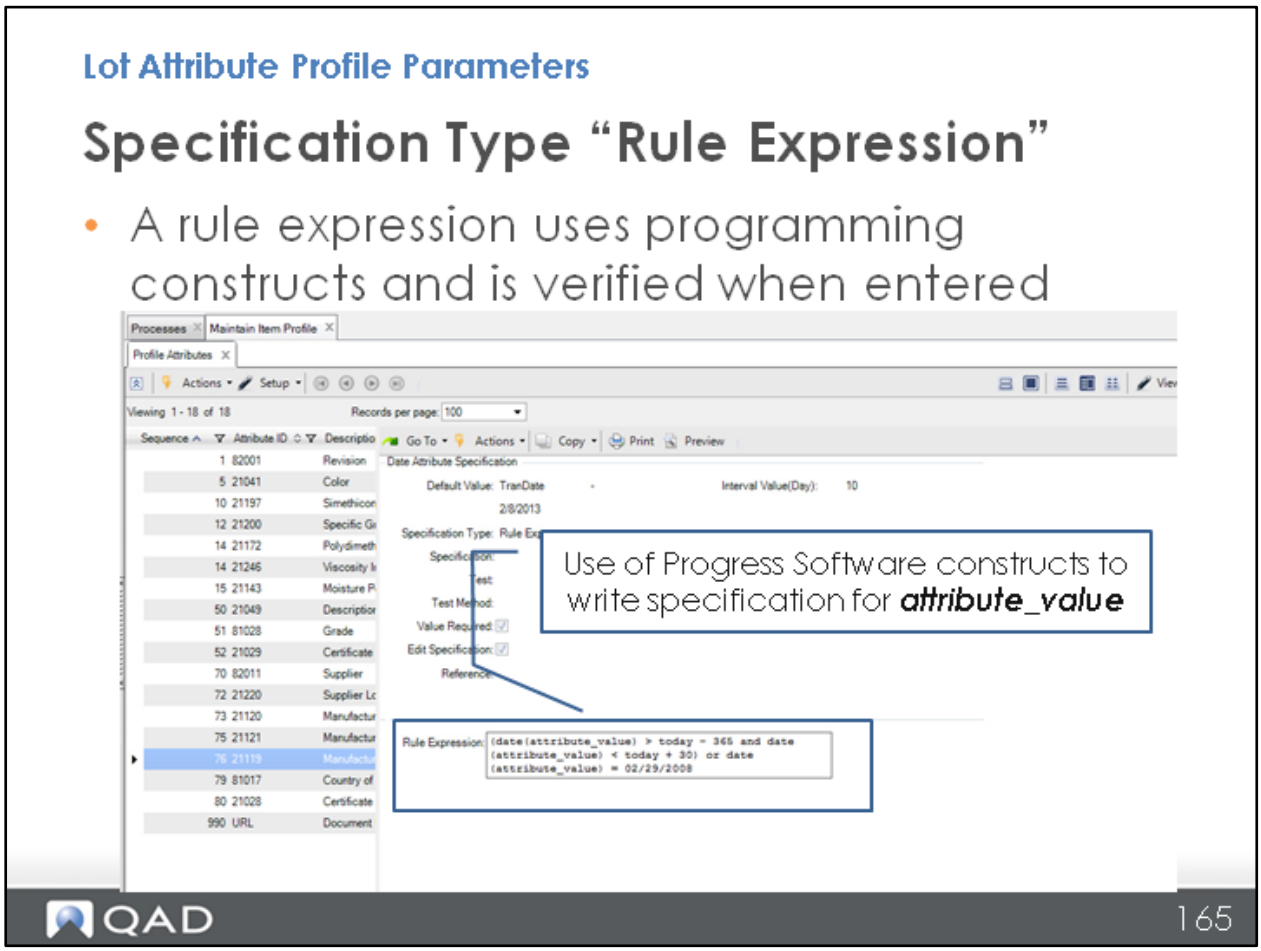


The Membership specification type accepts a given number of alphanumeric strings which are acceptable values.
You can choose to create an Include list, which determines a set number of acceptable values. Alternately, you can create an Exclude list, which allows all values other than the listed strings.

In either case, you must separate values by commas.

Note: Although you can create an Include list and an Exclude list, the Include list always takes precedence over the Exclude list, and the Exclude list is disregarded.

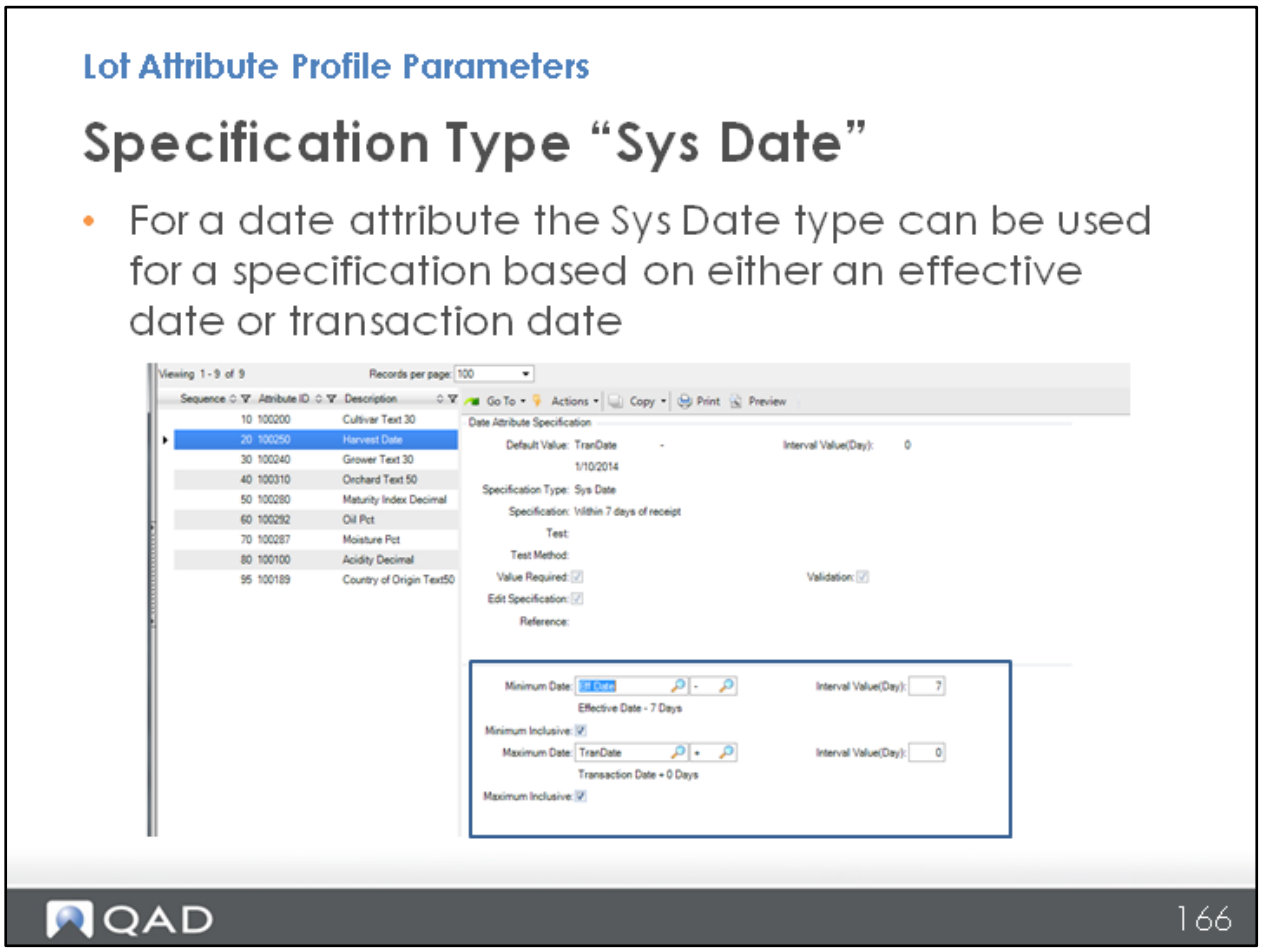
Specification Type “Rule Expression”



The Rule Expression specification type evaluates values using Progress Software constructs.

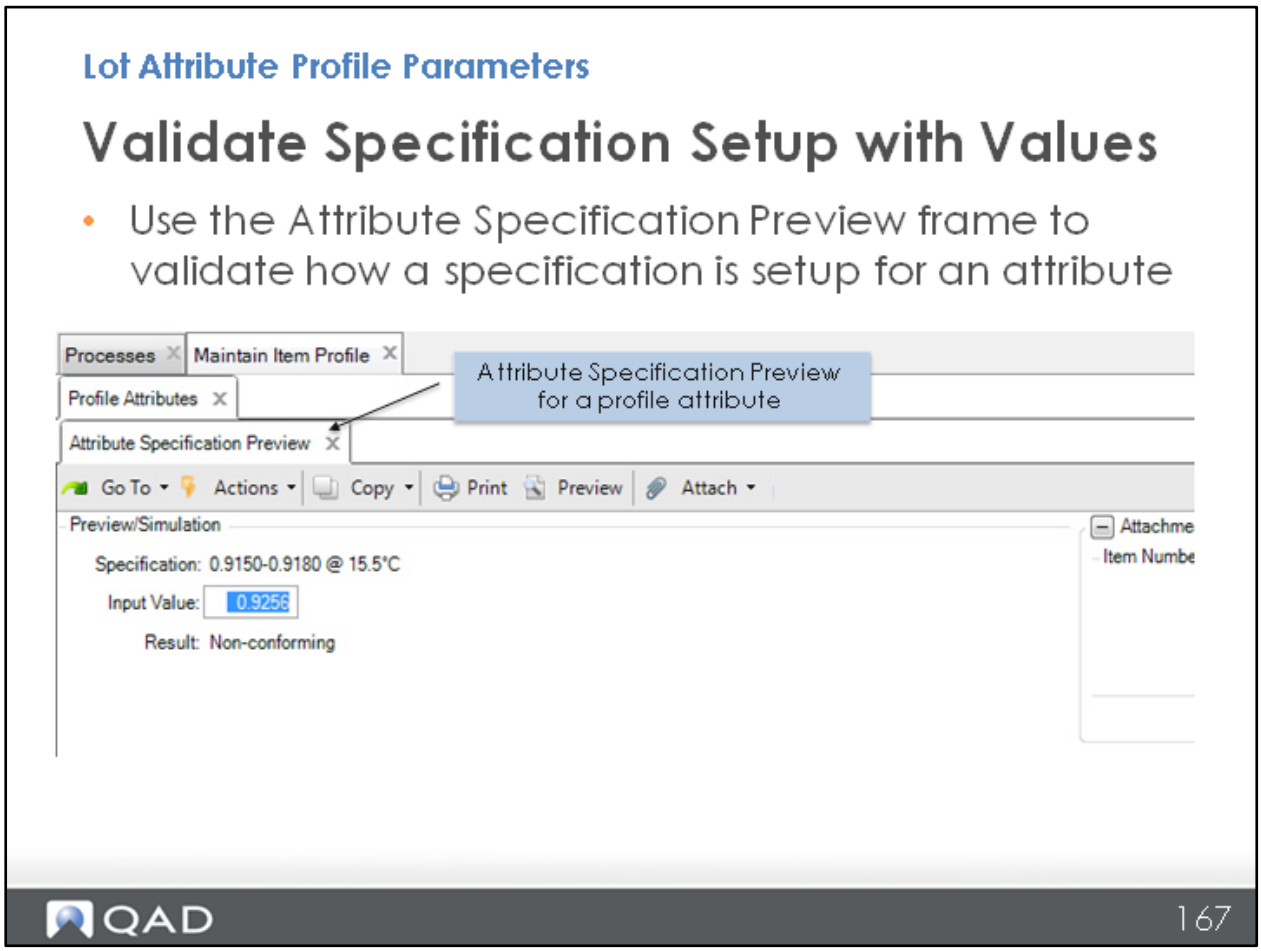
Use ‘attribute_value’ as the variable that is the subject for the expression. This is an advanced function, and requires knowledge of Progress Software to use.

Specification Type “Sys Date”



System date specifications are based on either ‘Effective Date’ or ‘System Date’

Validate Specification Setup with Values

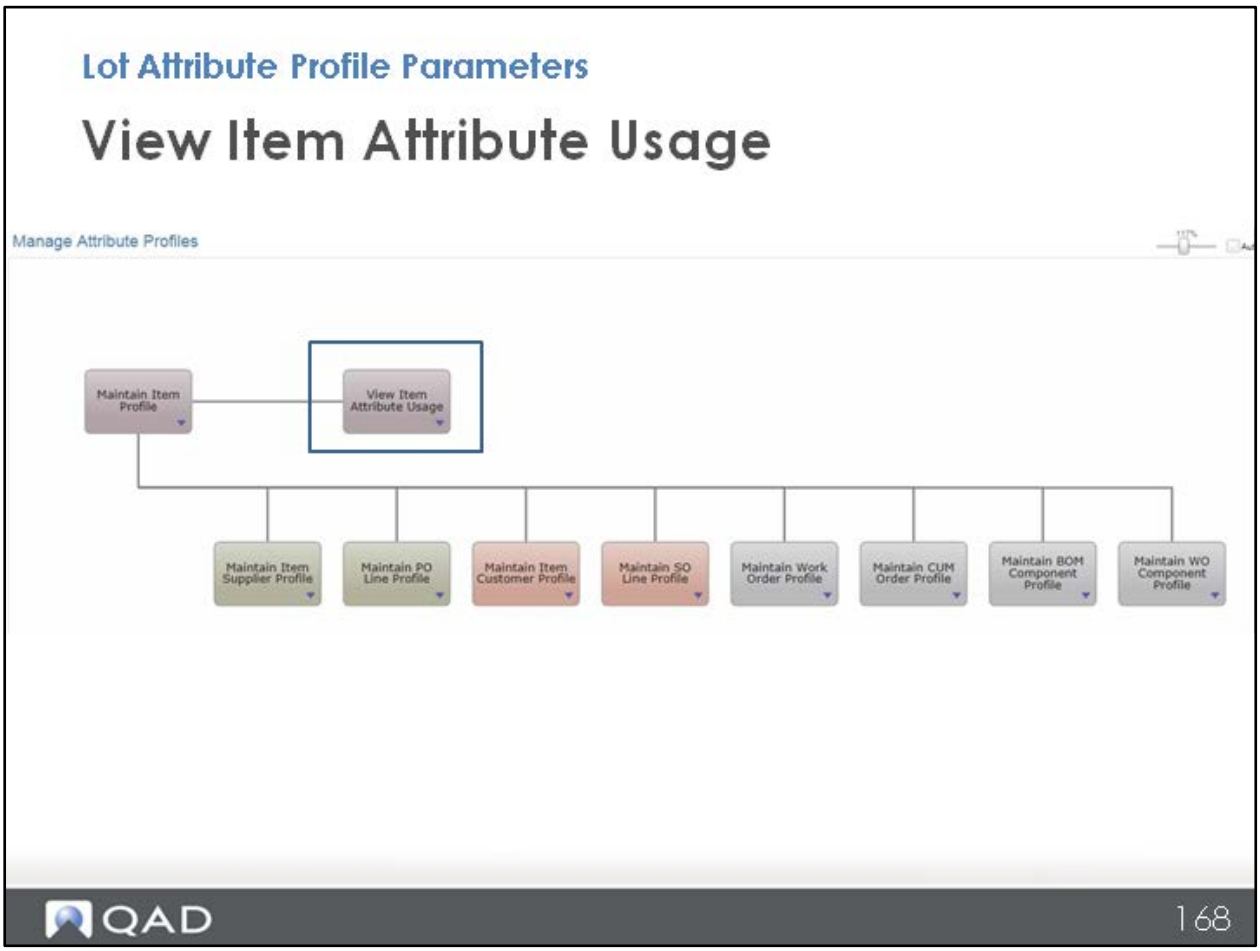


After entering a specification type and deails for an attribute specification, you can validate the attribute specification by using the Attribute Specification Preview tab.

The tab will list the specification for the chosen attribute. Enter an Input Value and press Next to determine if that value is acceptable.

The system will then display whether that result conforms to the specification.

View Item Attribute Usage

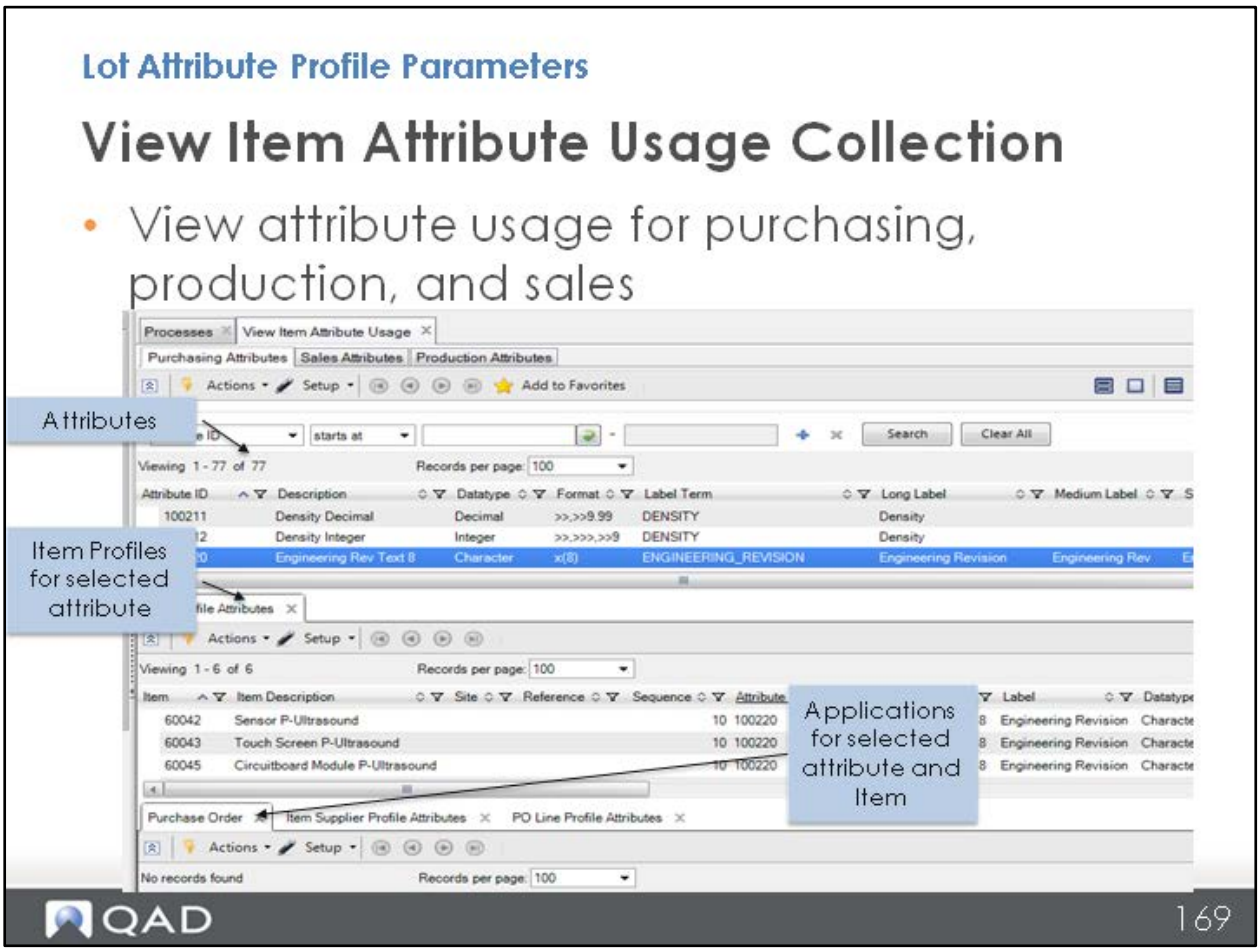


Next, this guide covers the usage of item attributes. To begin, open View Item Attribute Usage in the process maps.

Access this option in the process maps through:

Home > Manage Enterprise Item Attributes > Set Up Item Attributes and Profiles > Manage Attribute Profiles

View Item Attribute Usage Collection

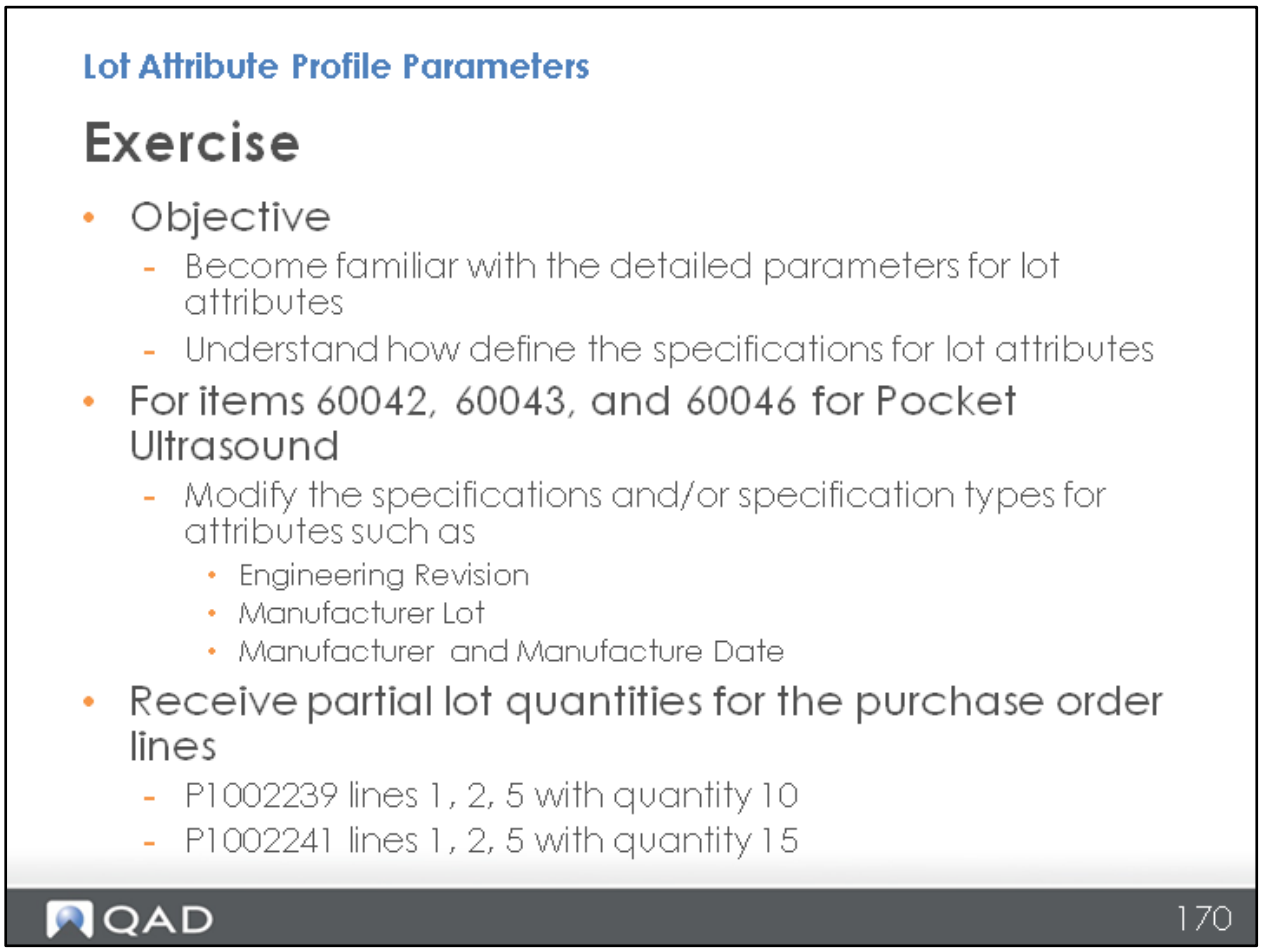


In the View Item Attribute Usage browse collection, attributes are organized by their associated business functions.

The three top level tabs show attributes associated with purchasing, attributes associated with sales, and attributes associated with production.

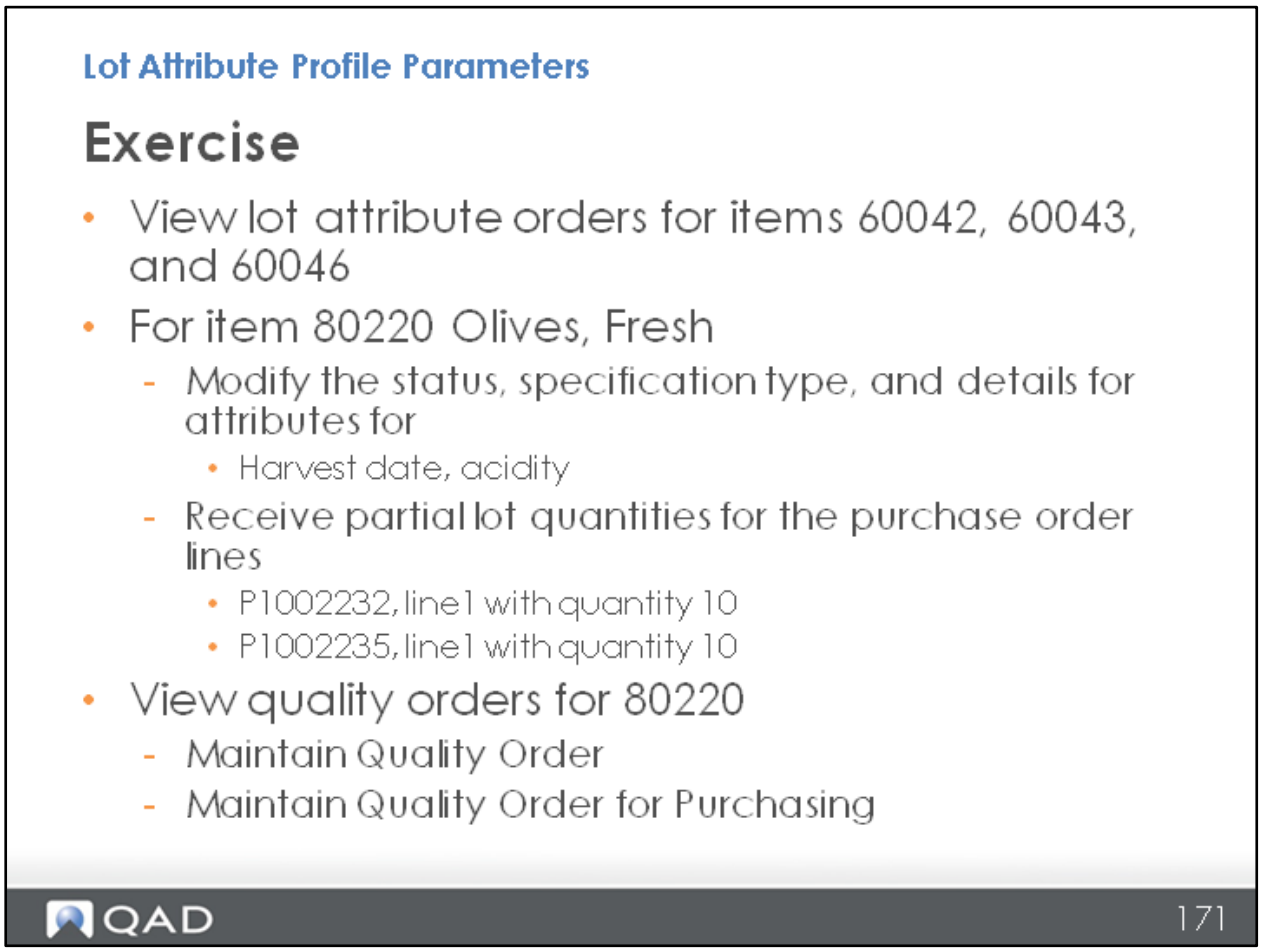
The third level tabs show business operations associated with that organizational type.

Exercise



Note: Set the status parameter for attributes to ‘Active’. The profile attributes will vary by item.

Exercise



Quality orders are created for this item because there is at least one test specification for the item

View lot attribute orders for items 60042, 60043, and 60046

Maintain Lot Attribute Order

Maintain Lot Attribute Order for Purchasing

View quality orders for 80220

Maintain Quality Order

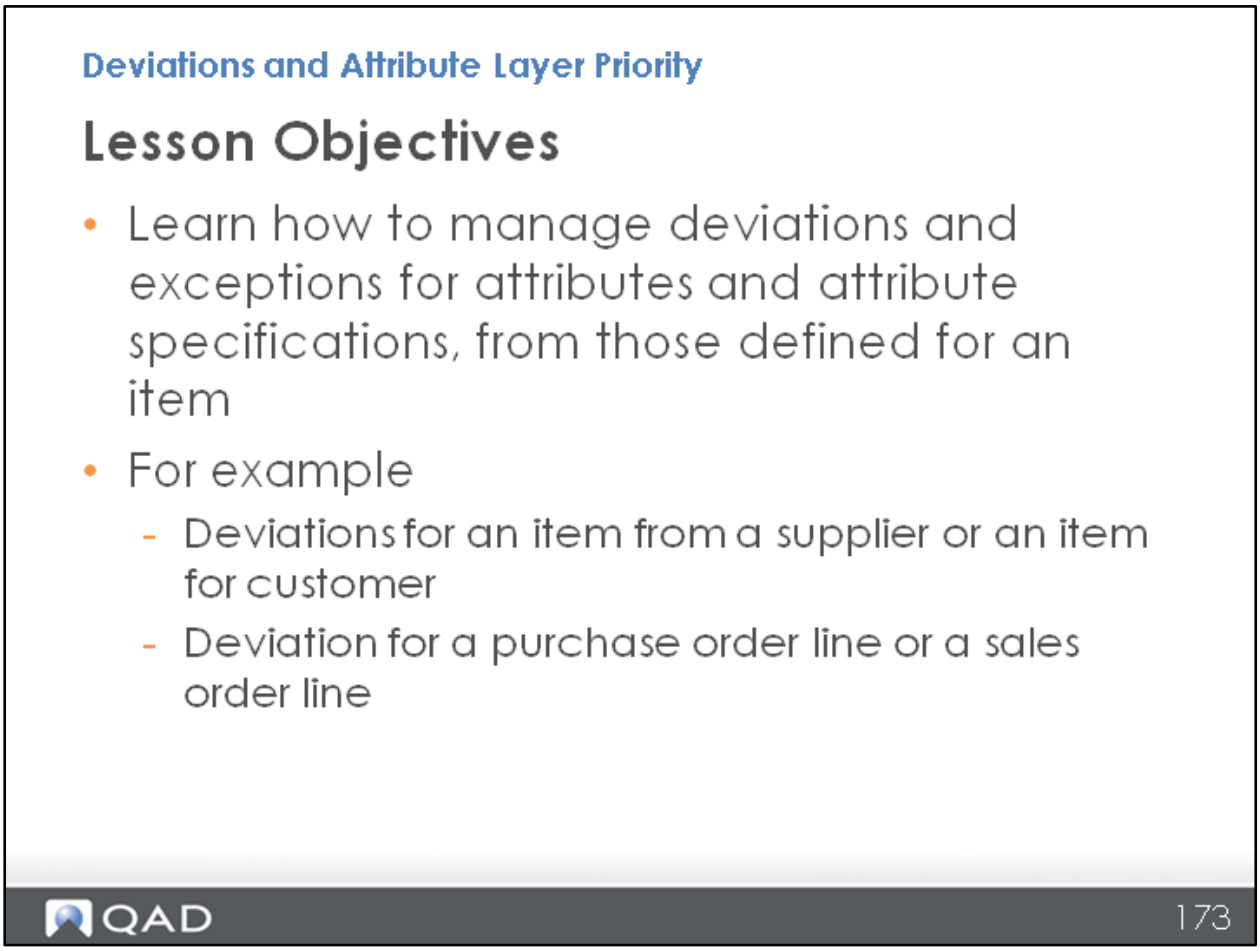
Maintain Quality Order for Purchasing

CHAPTER 8

Managing Attribute Deviations

Deviations and Attribute Layer Priority

Lesson Objectives

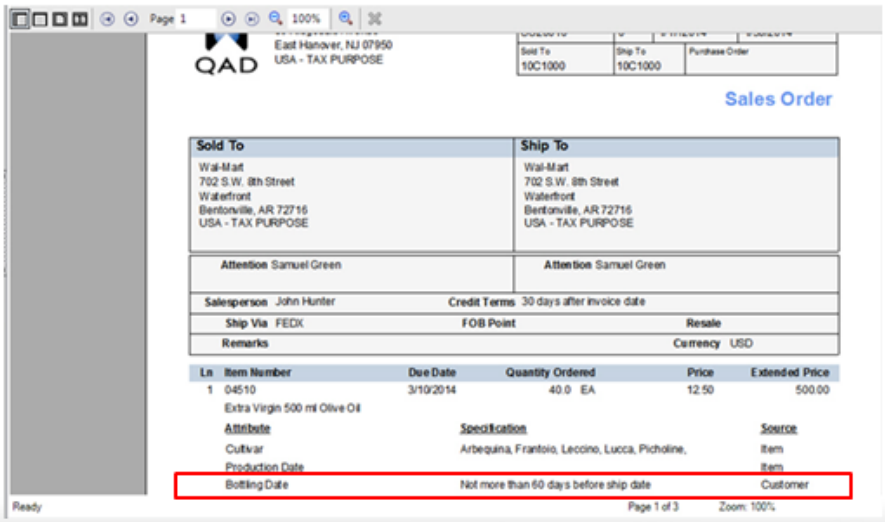


Customer and Sales Order Deviations

Item Attributes & Quality Control

Customer and Sales Order Deviations

- For printing and qualification of materials for allocation, picking, and shipment



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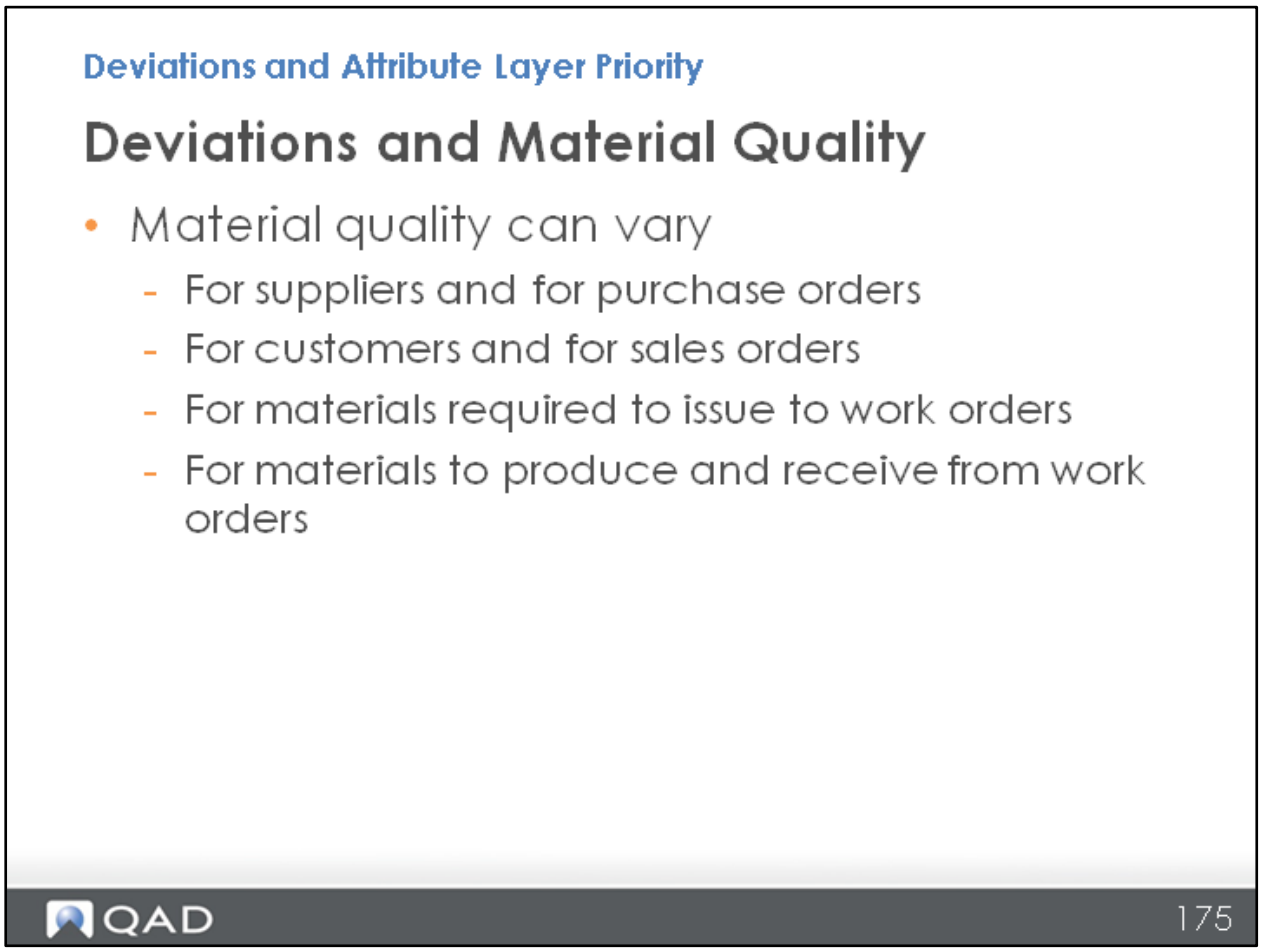
Deviations and Material Quality



So far, you have covered how to handle the common concepts and situations which involve item attributes.

This section of the guide covers deviations from the norm. These deviations result from the number of ways that items, lots, requirements, and defaults can vary in the realistic course of business. Fortunately, QAD EE has the tools to adapt to these situations.

Common Deviations

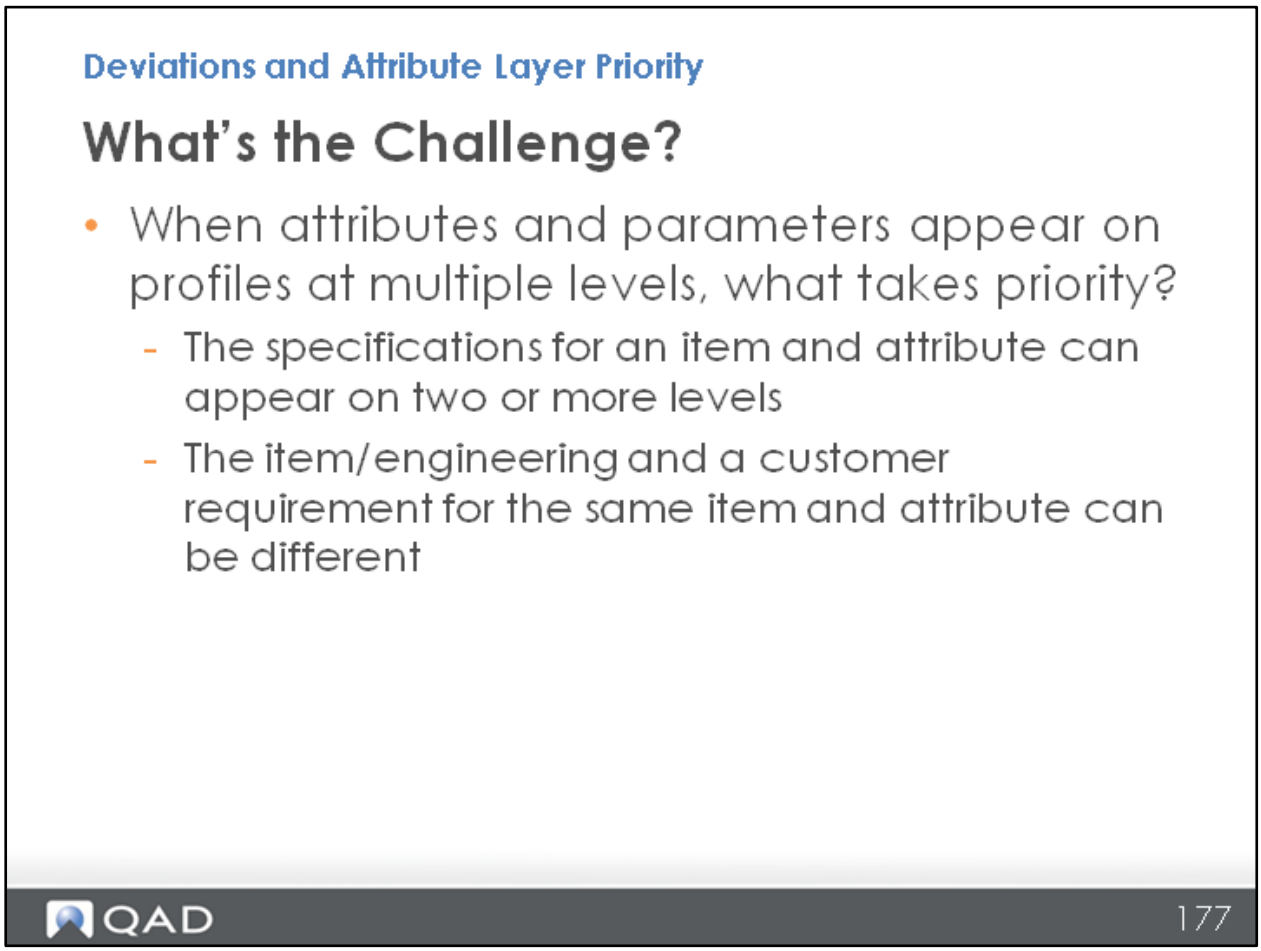
The most common deviations come from three areas of business.

Purchasing creates deviations through the variations among items and suppliers, and purchase orders.

Sales creates deviations through the variations among items and customers, and sales orders.

In production, deviations result from the variations among orders and components, and the requirements of make-to-order production.

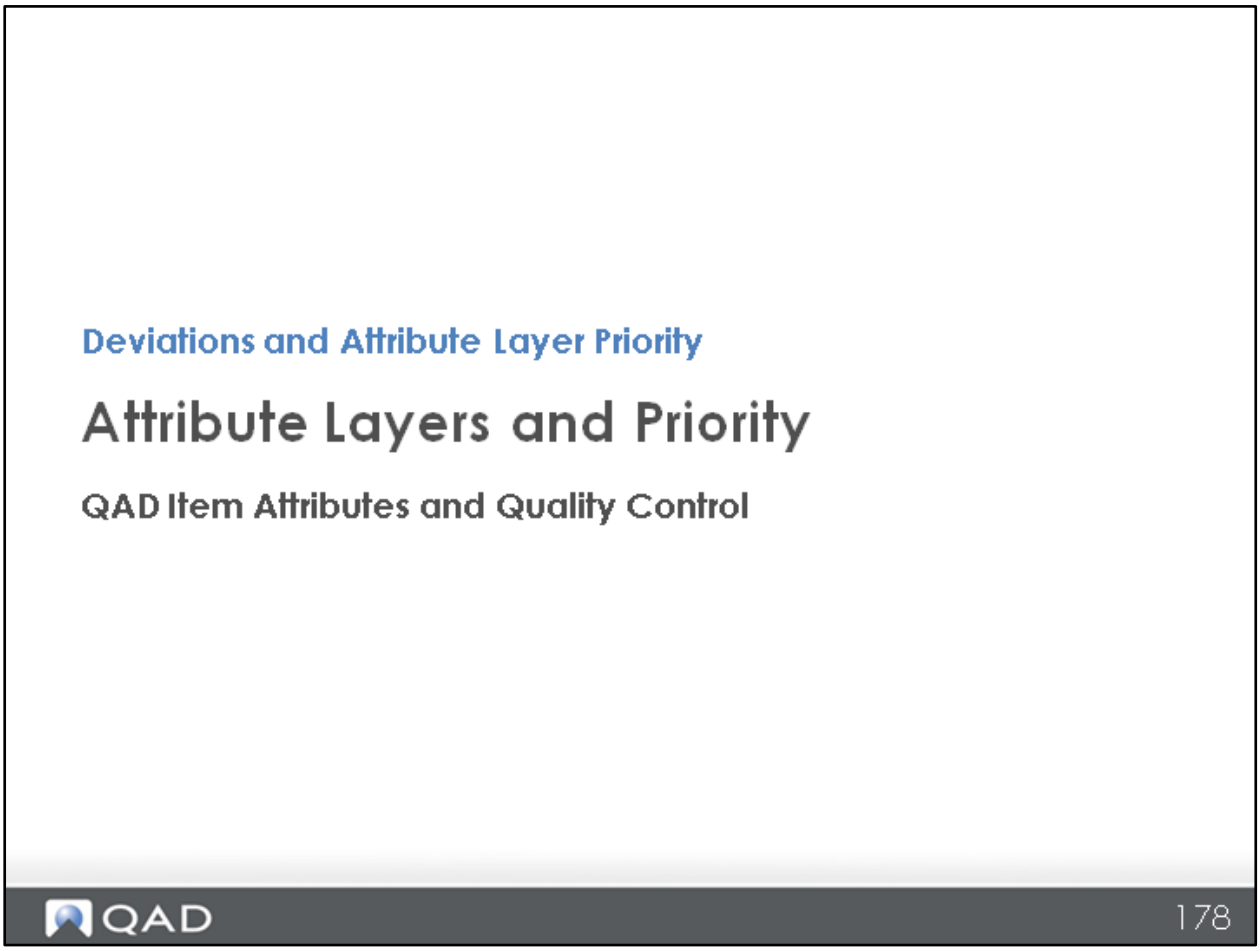
What's the Challenge?



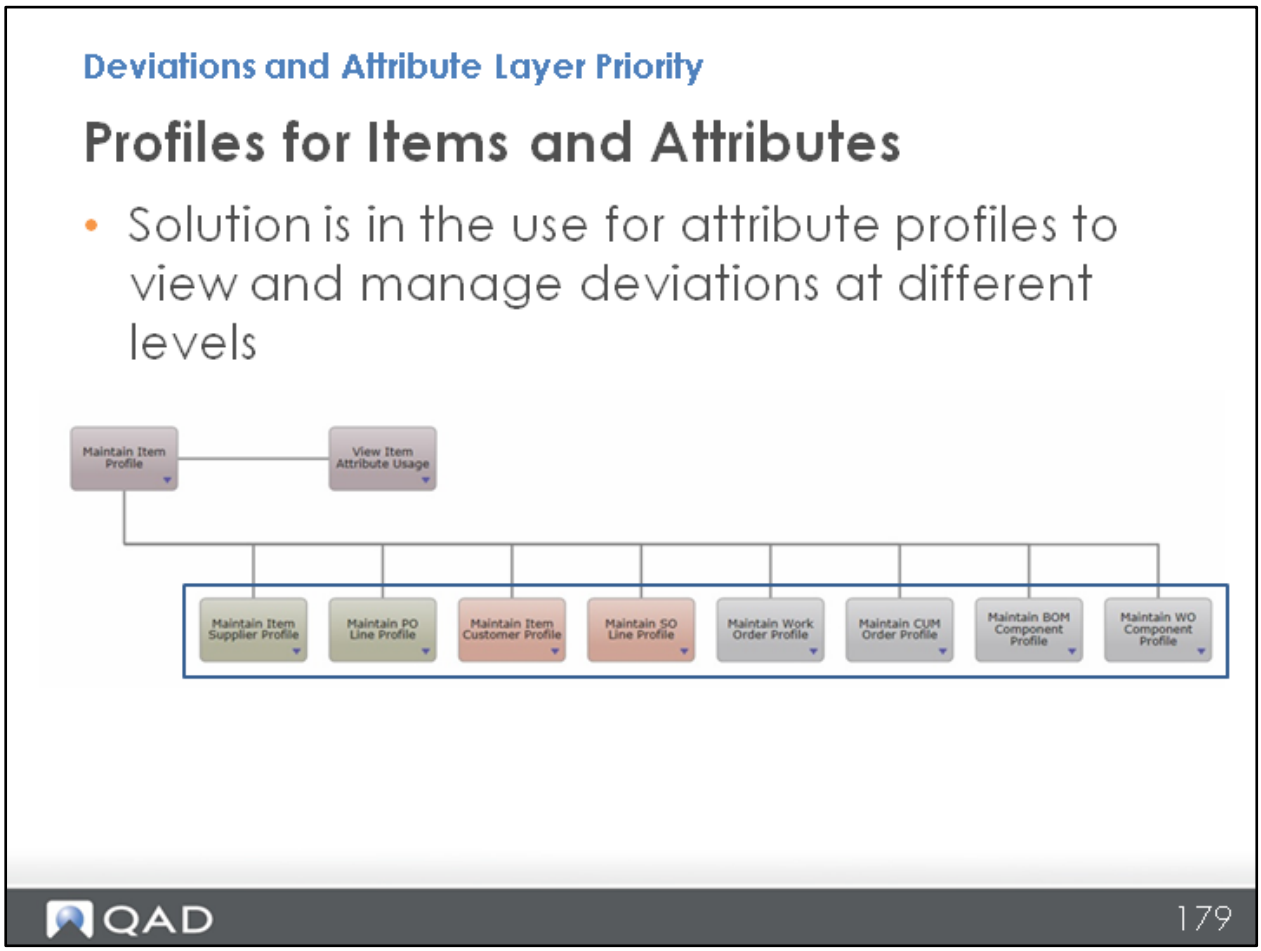
So far, you have covered how to handle the common concepts and situations which involve item attributes.

This section of the guide covers deviations from the norm. These deviations result from the number of ways that items, lots, requirements, and defaults can vary in the realistic course of business. Fortunately, QAD EE has the tools to adapt to these situations.

Attribute Layers and Priority

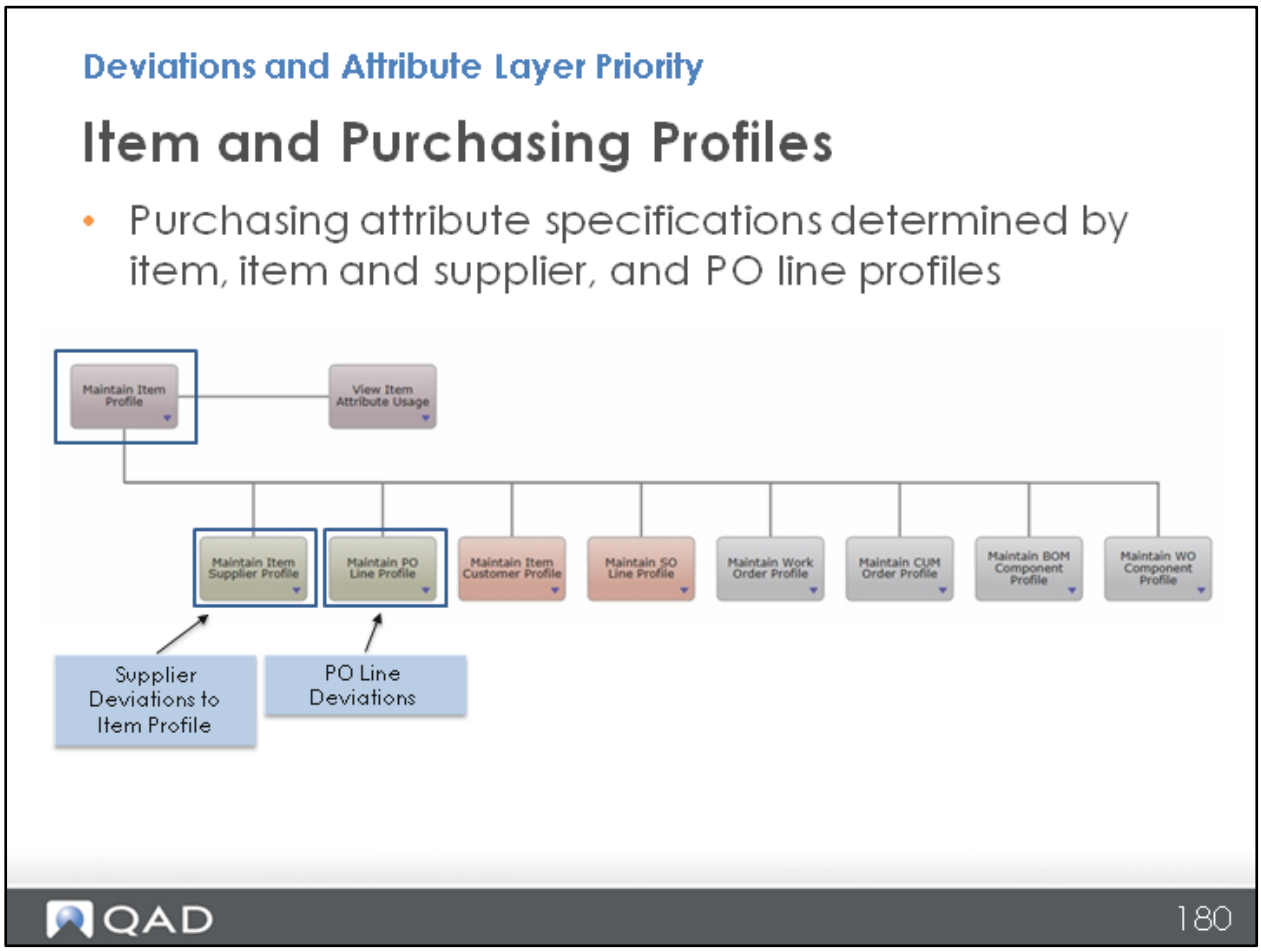


Profiles for Items and Attributes



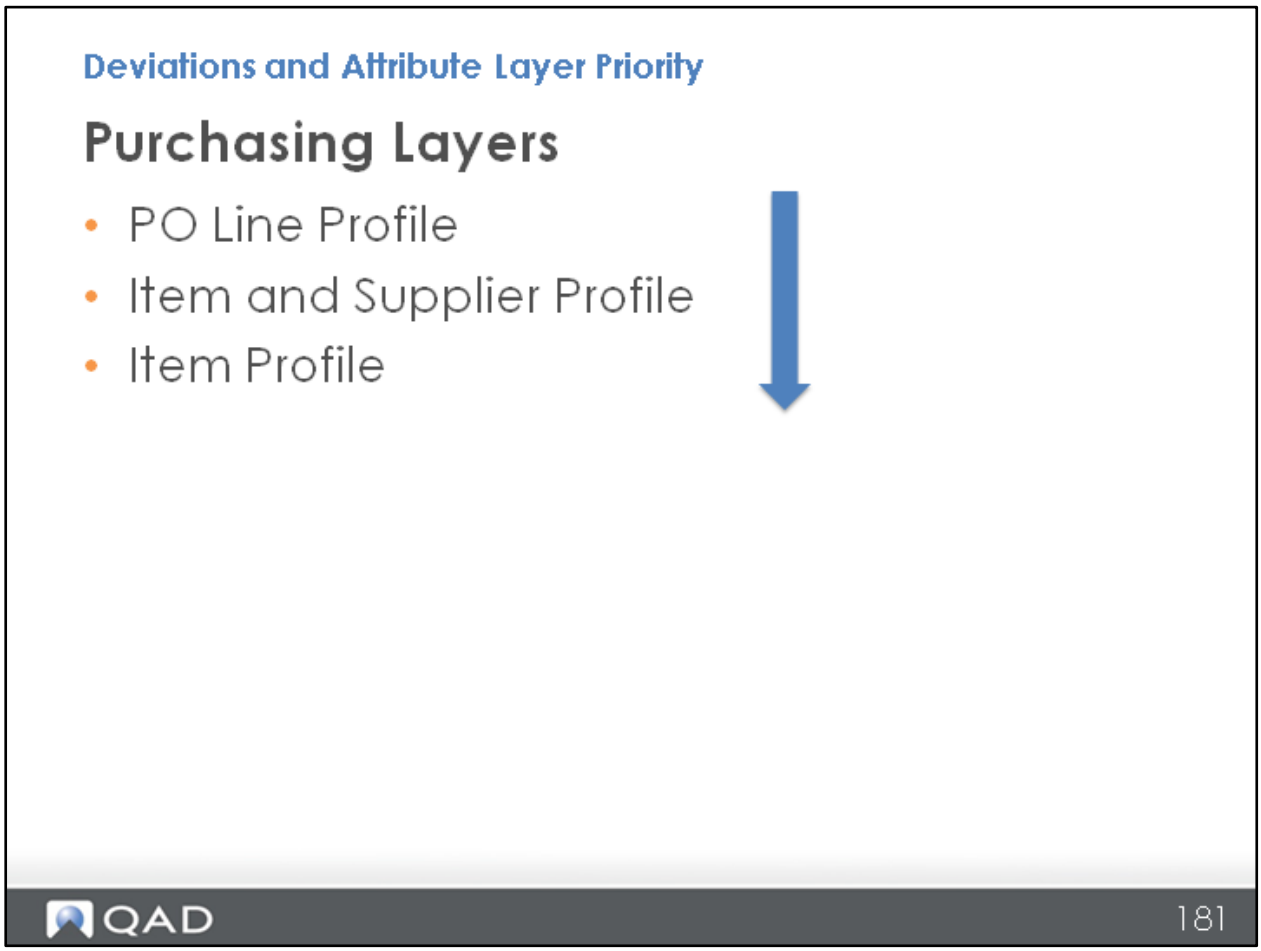
Many deviations involve the different types of profiles which exist for items.

Item and Purchasing Profiles



Visualize three layers that can be used to maintain attribute parameters and specifications for purchasing: The first for an item, the second for an item and supplier, and a third for an item on a PO line.

Purchasing Layers



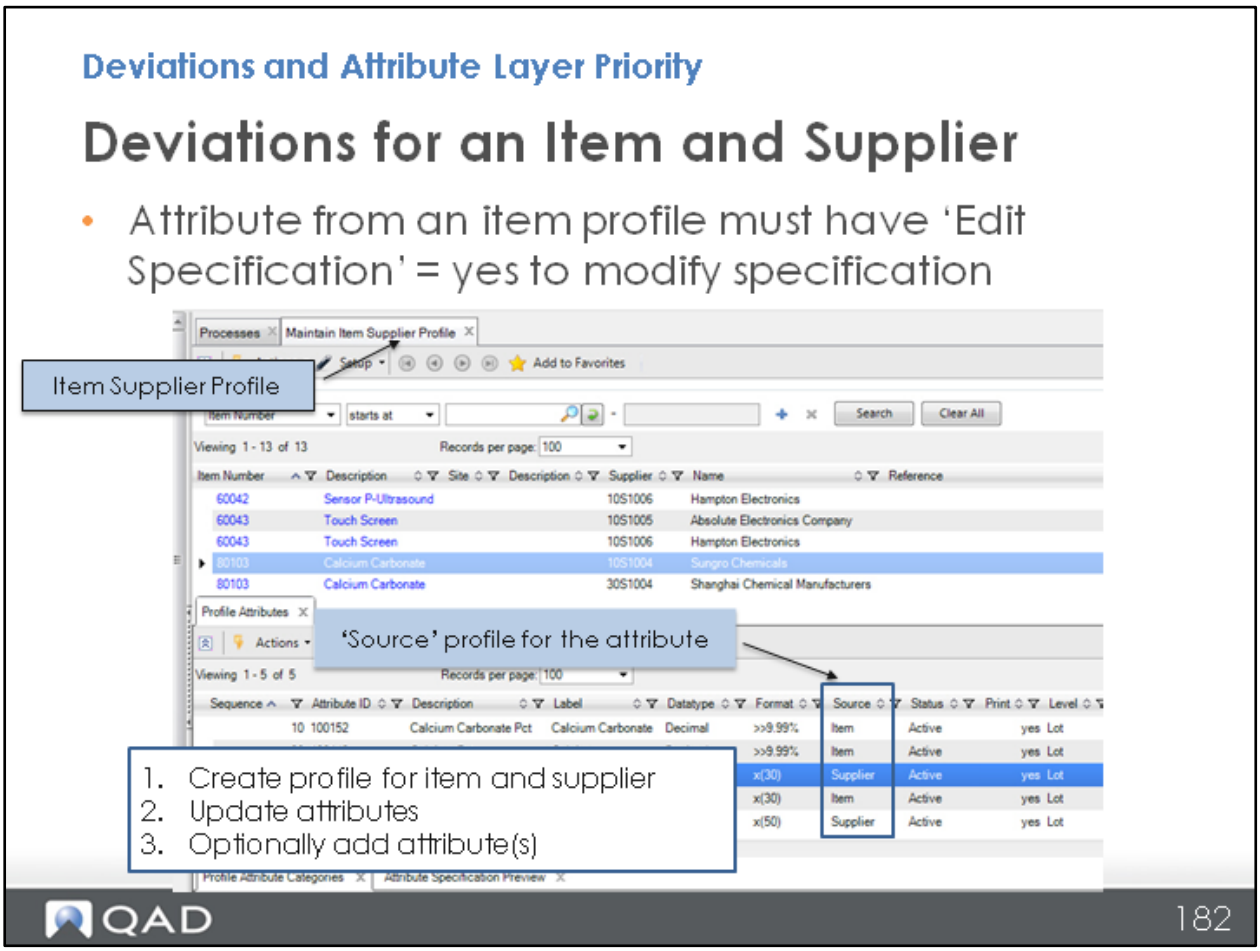
Visualize three layers that can be used to maintain attribute parameters and specifications for purchasing.

The Item Profile layer is the most generic and applies to all instances of an item.

The Item Supplier Profile layer is more specific and applies when both conditions are met.

The PO Line Profile layer is the most specific of these and applies only to specific PO lines.

Deviations for an Item and Supplier

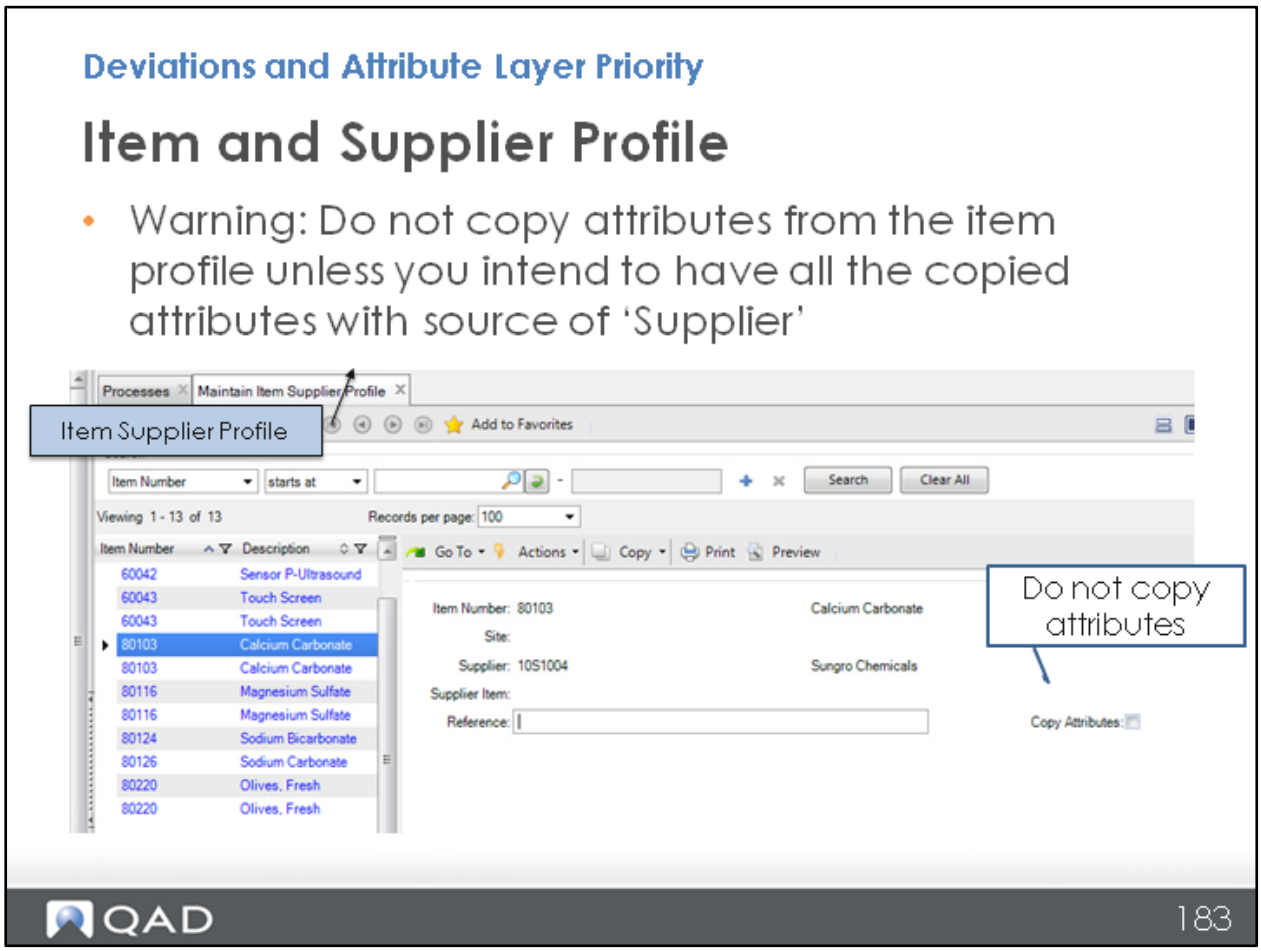


It is often necessary to track different attributes when dealing with a certain supplier. In such cases, you can create an item supplier profile which contains alternate attributes.

In the graphic above, observe that several attributes have a Source of supplier. This indicates that several are specific to the supplier, whereas most apply to the item generally.

To create a new item supplier profile, click the Create button in the top right. Alternately, you can Modify an existing profile.

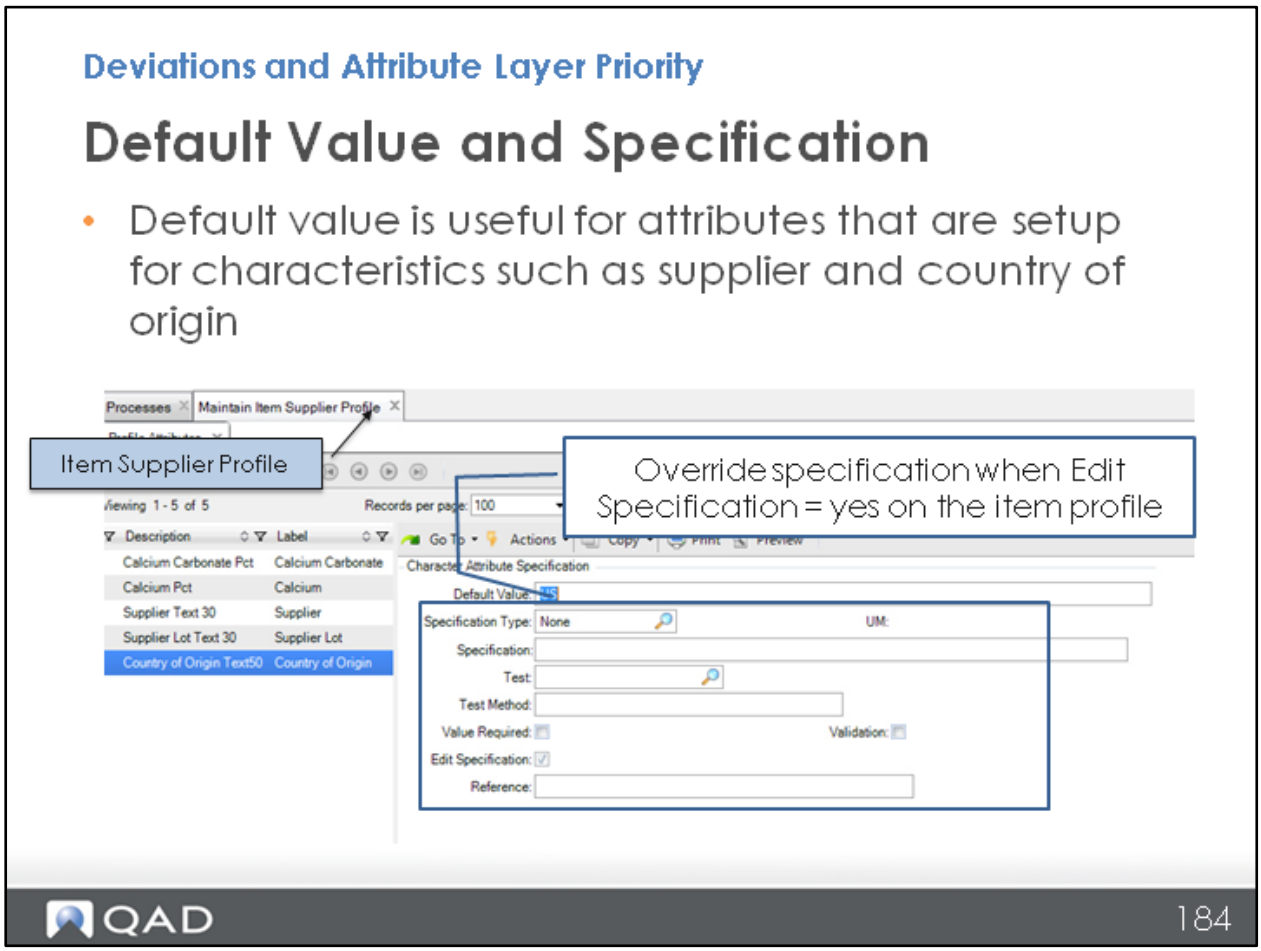
Item and Supplier Profile



When creating or modifying an item supplier profile, begin by entering the appropriate Item Number and Supplier.

You are given the option of copying all attributes from the item, but you should avoid doing this. Item supplier profiles are intended to manage deviations and exceptions to item profiles, not replace them entirely.

Default Value and Specification

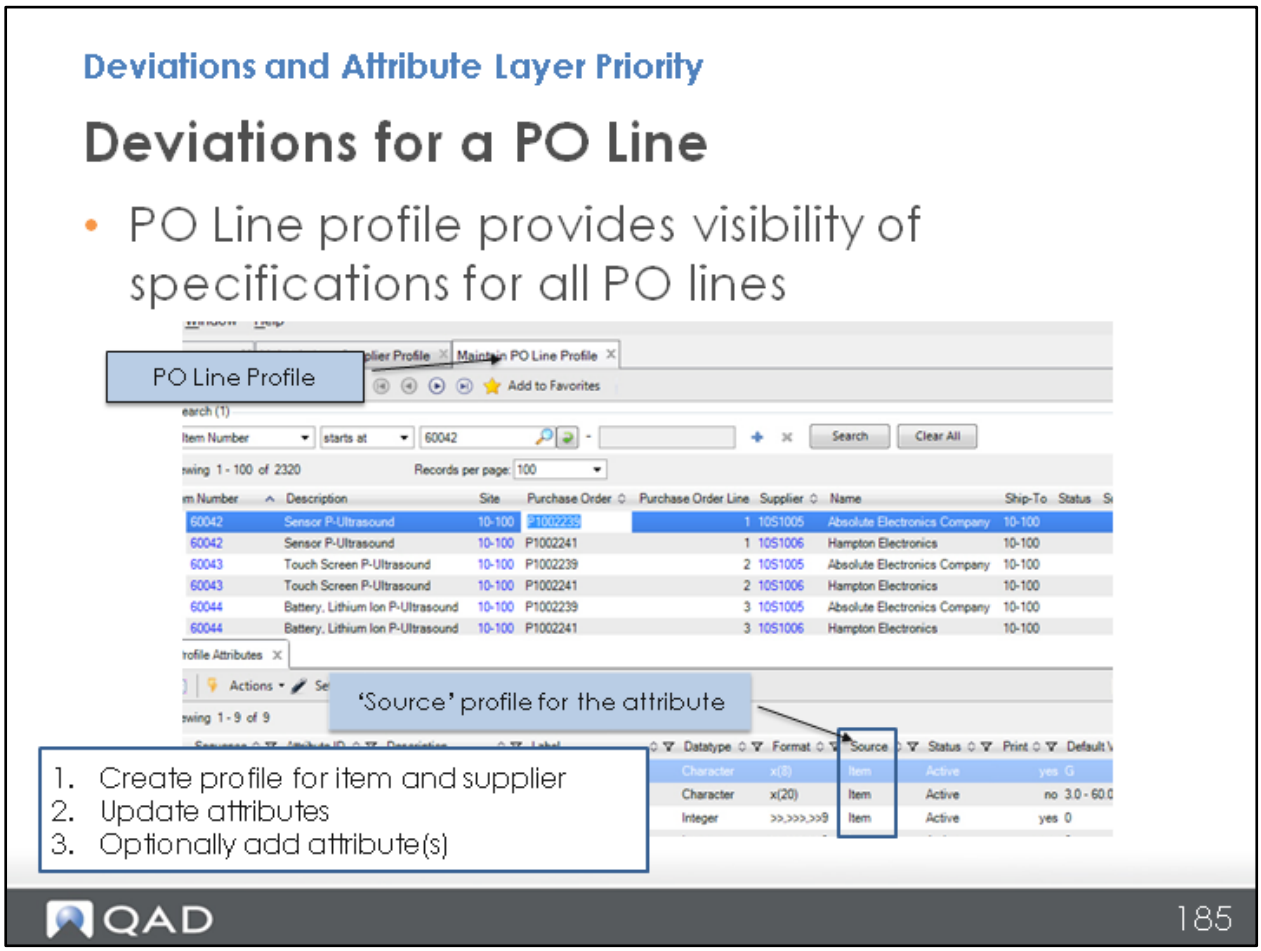


In the second level Profile Attributes tab, you can add attributes to the item supplier profile.

You can create alternate versions of the attributes in the generic item profile, or you can add entirely new attributes.

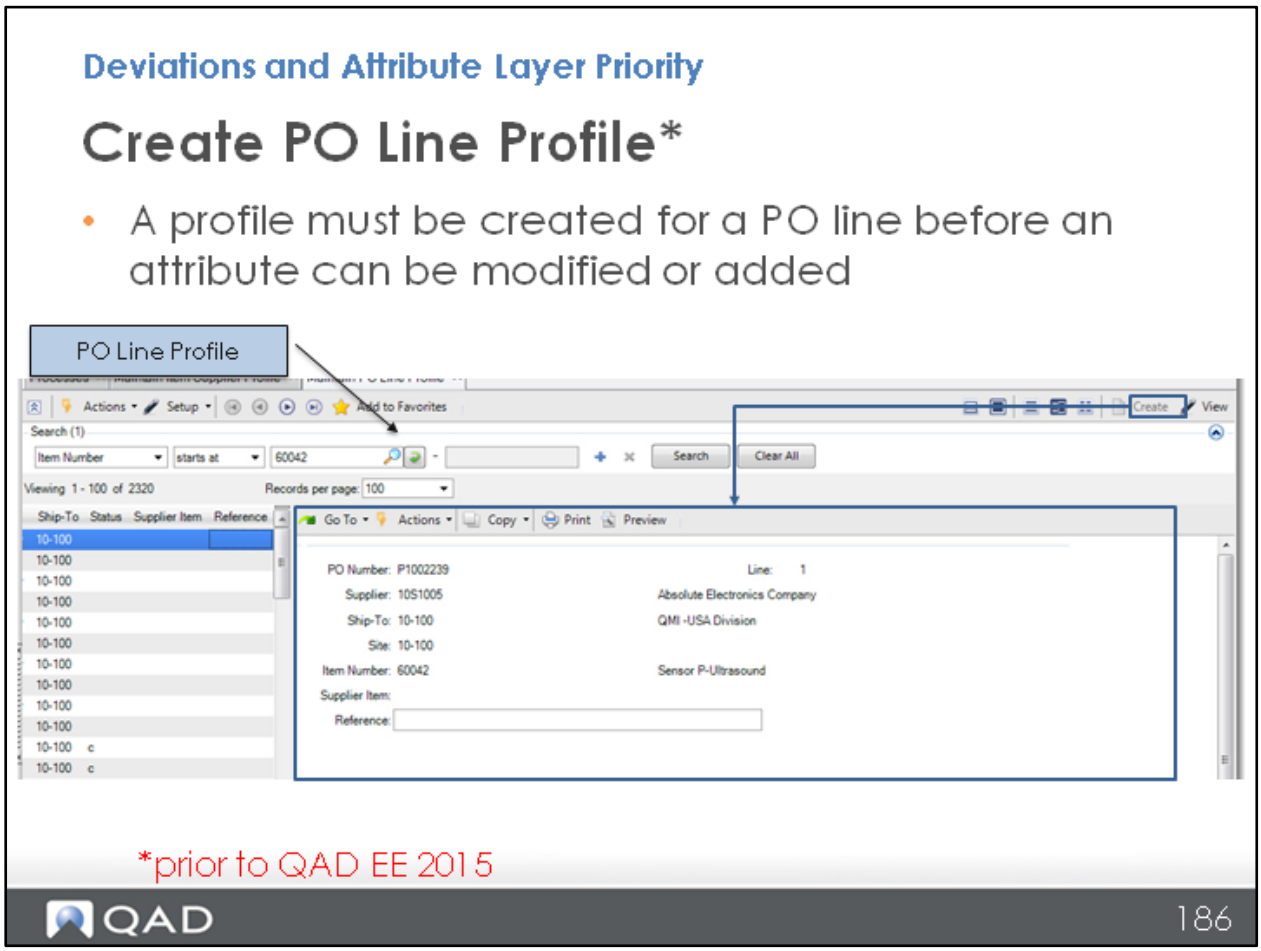
These attributes appear on lots whose item and supplier match this profile. Both the generic item profile and the item supplier profile add their attributes. If the same attribute comes from both profile, the higher priority item supplier attribute overrides the generic attribute.

Deviations for a PO Line



As with suppliers, sometimes the requirements for a purchase order vary. Much like the item supplier profile, you can create a unique profile for a purchase order.

Create PO Line Profile*

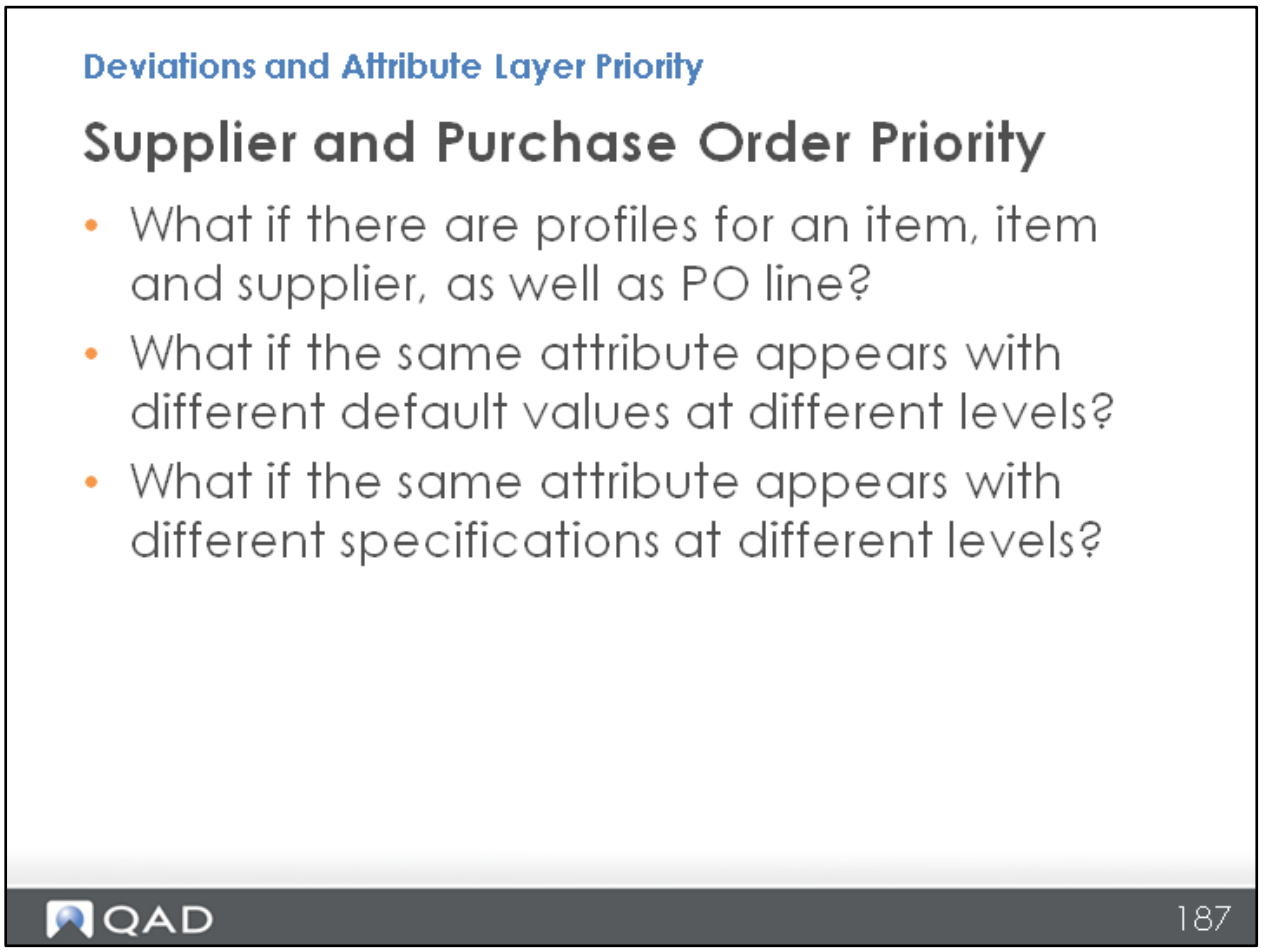


You can create or modify PO line profiles through the Maintain PO Line Profile browse collection.

As with an item supplier profile, specify a PO Number, Item Number, and Supplier for your profile.

Again, as with an item supplier profile, add attributes which you want to apply to this specific PO Line.

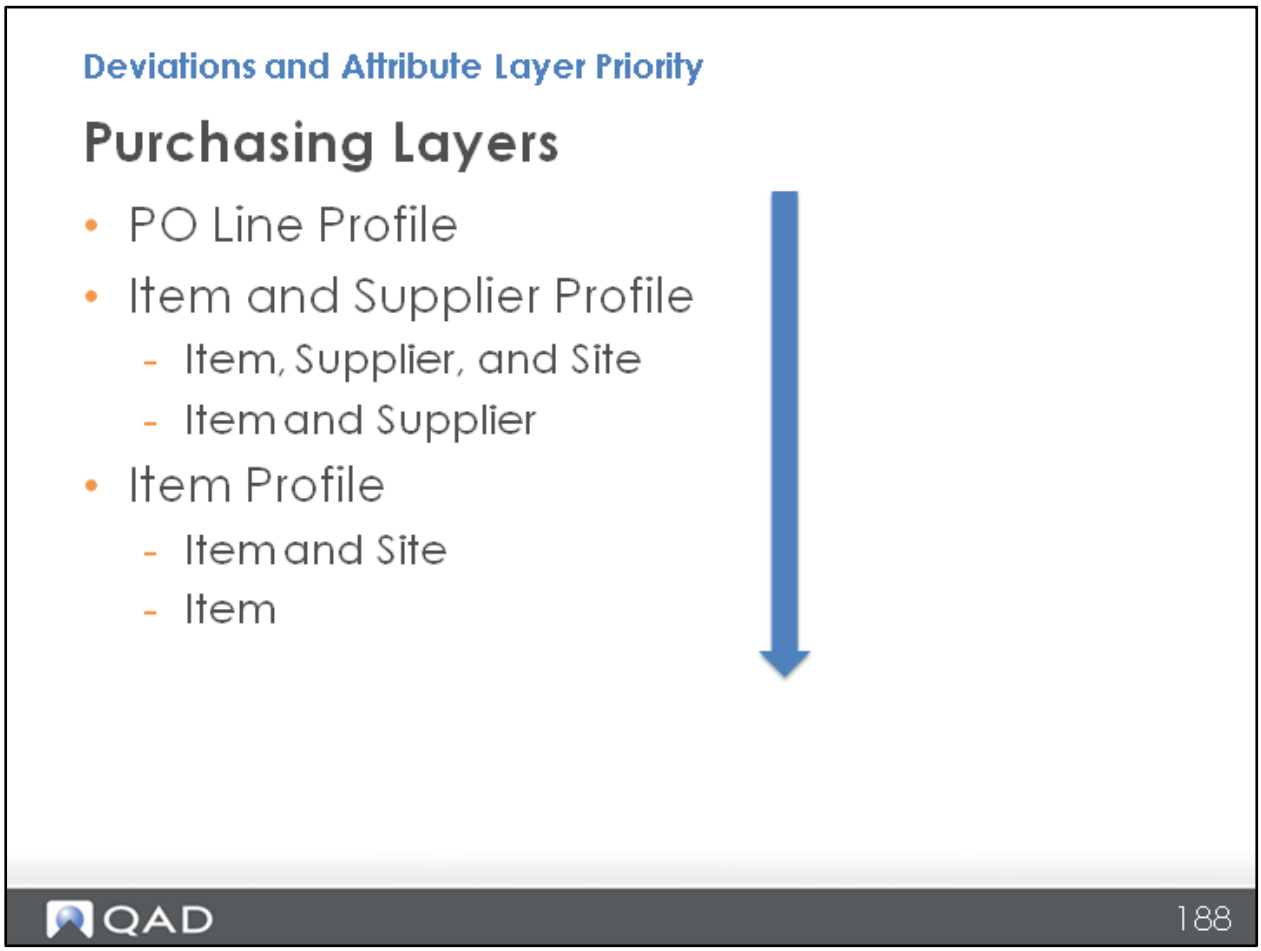
Supplier and Purchase Order Priority



In covering these variations, you have dealt with profiles that override other profiles.

These differing profiles utilize a set of layers and priorities. These control how profile attributes override one another.

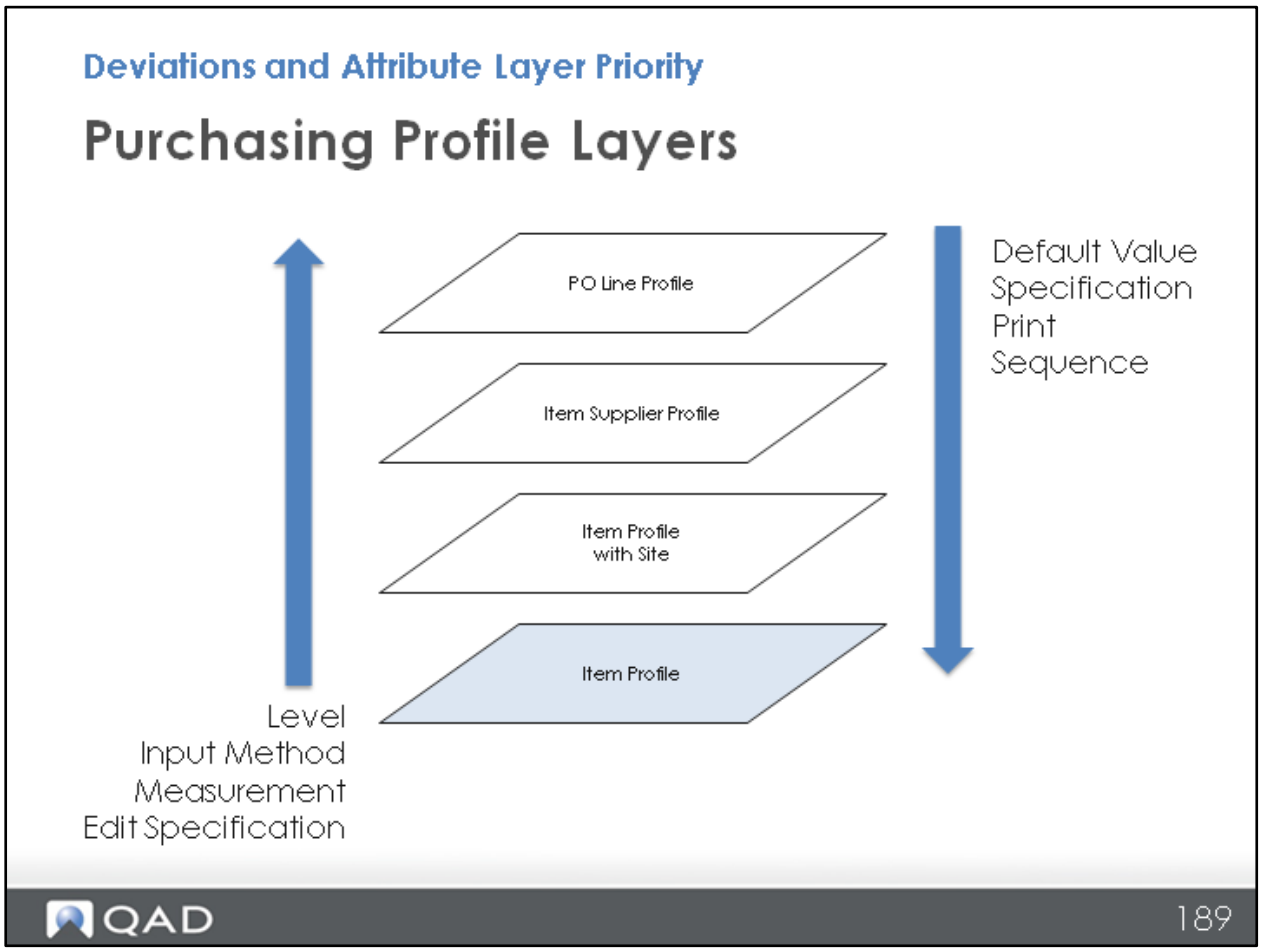
Purchasing Layers



In addition to these three, there are two more sub-layers. These apply if there is a site specified in either an Item Supplier Profile or Item Profile.

These sub-layers determine how different entries within a layer override one another. They will not, however, allow a layer to override a higher layer.

Purchasing Profile Layers

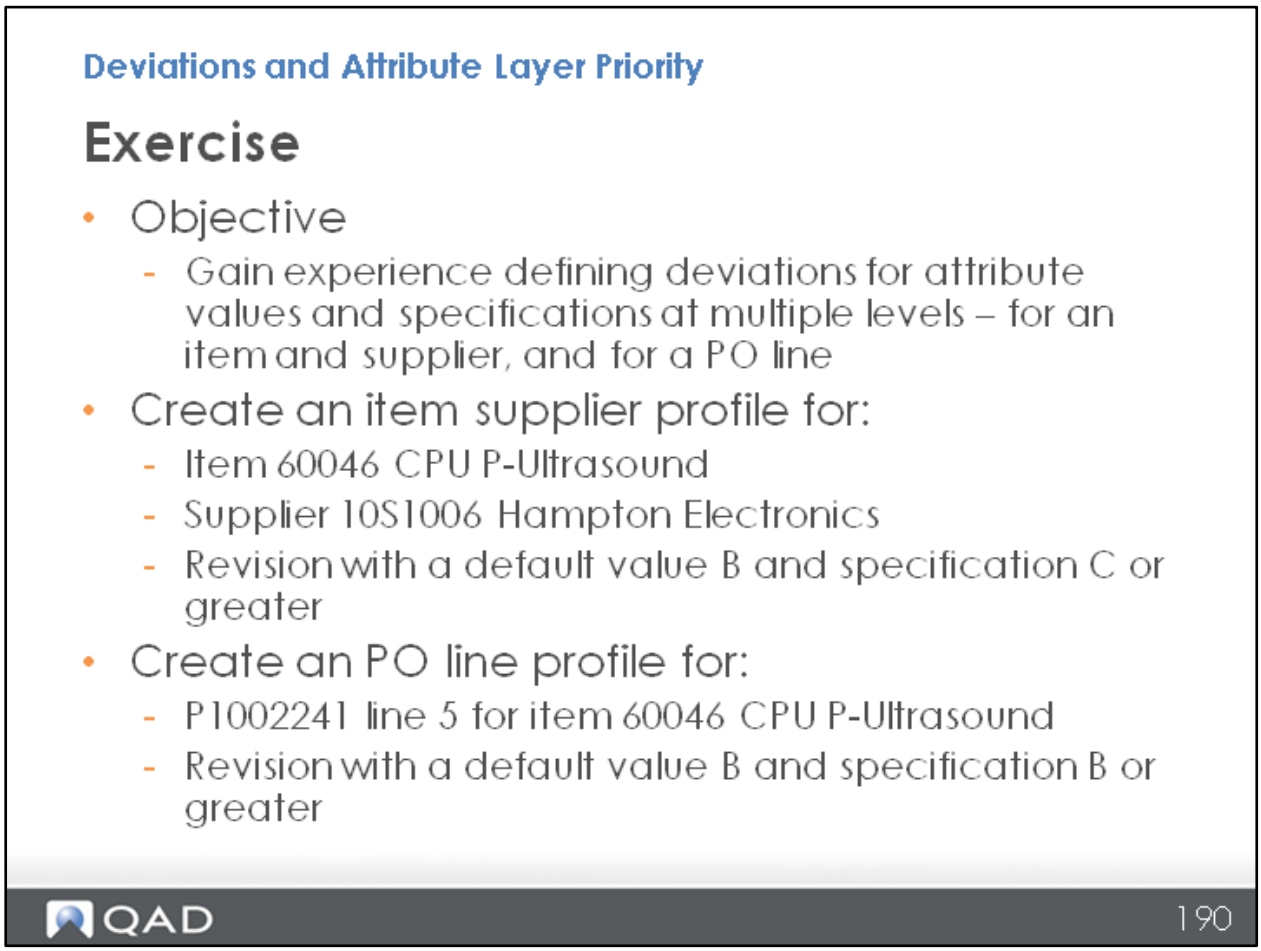


Field priority functions in both directions, depending on the field.

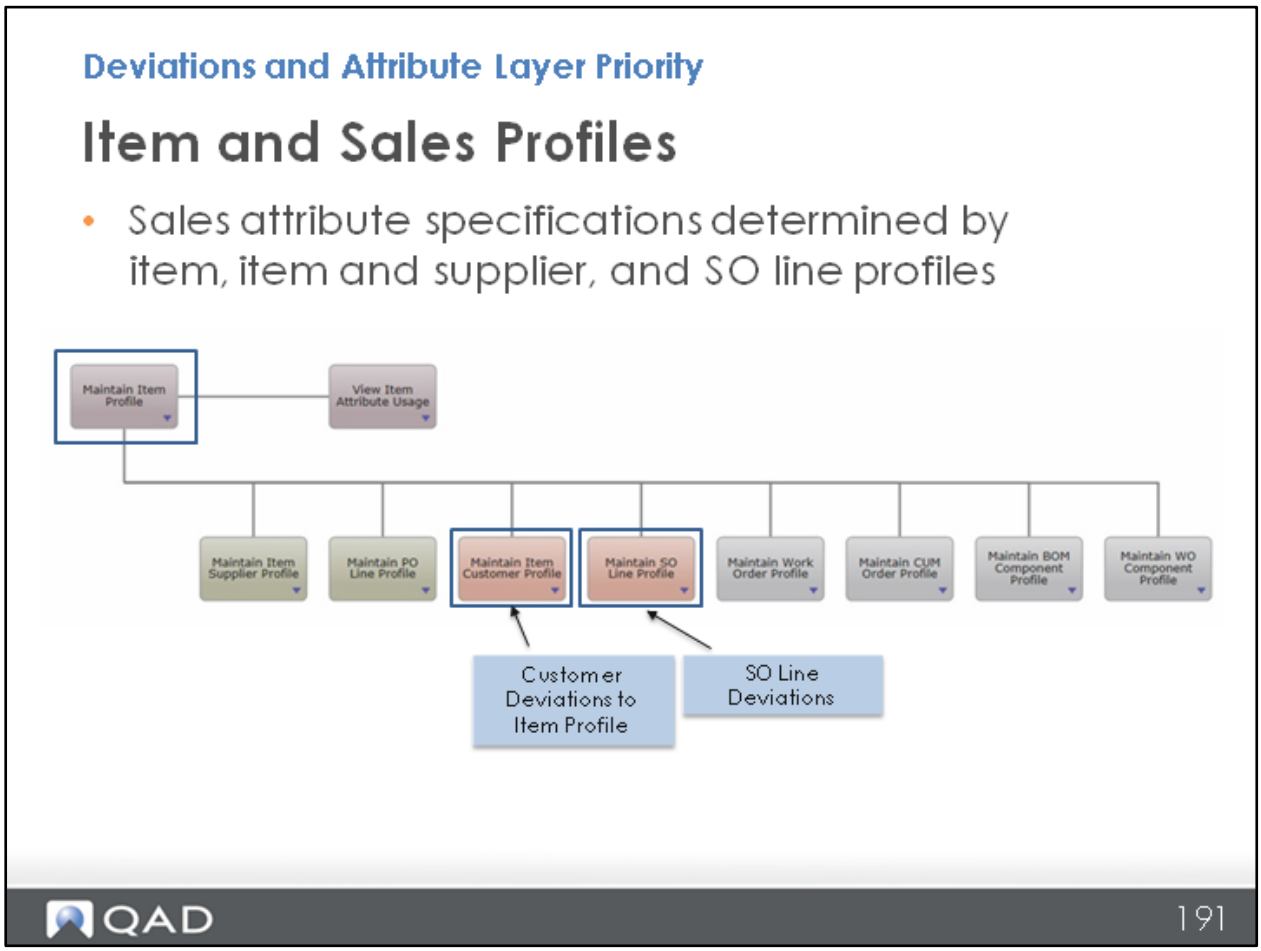
In the case of Default Value, Specification, Print, and Sequence, the highest layer has priority. This means that the field value of the highest layer cascades down.

In the case of Level, Input Method, Measurement, Edit Specification, the lowest layer has priority. This means that the field value of the lowest layer cascades up.

Exercise


Deviations and Attribute Layer Priority
Exercise
Objective
Gain experience defining deviations for attribute values and specifications at multiple levels – for an item and supplier, and for a PO line
Create an item supplier profile for:
Item 60046 CPU P-Ultrasound
Supplier 10S1006 Hampton Electronics
Revision with a default value B and specification C or greater
Create an PO line profile for:
P1002241 line 5 for item 60046 CPU P-Ultrasound
Revision with a default value B and specification B or greater
QAD
190

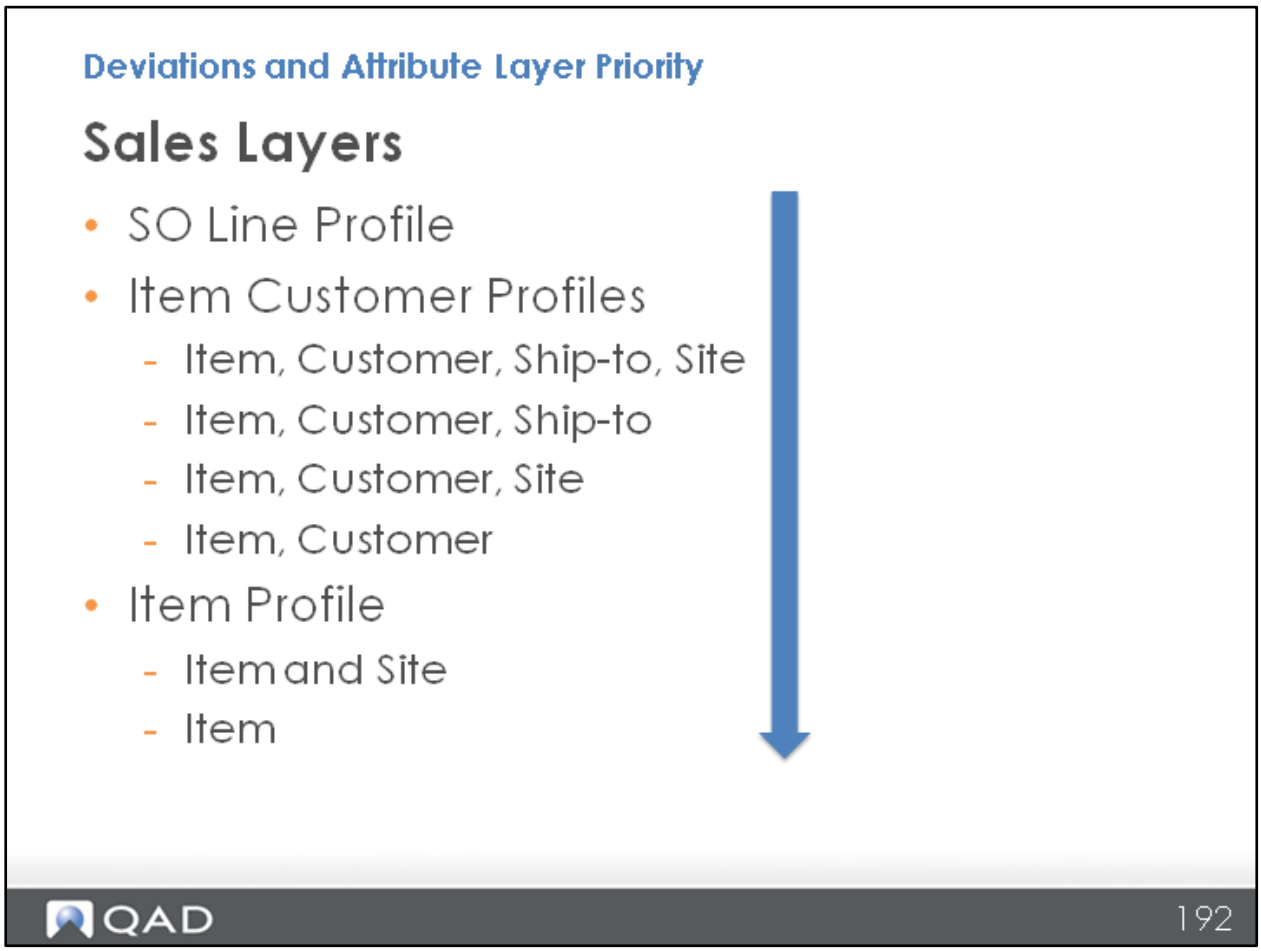
Item and Sales Profiles



Visualize three layers that can be used to maintain attribute parameters and specifications for sales:

The first for an item, the second for an item and customer, and a third for an item on a SO line.

Sales Layers

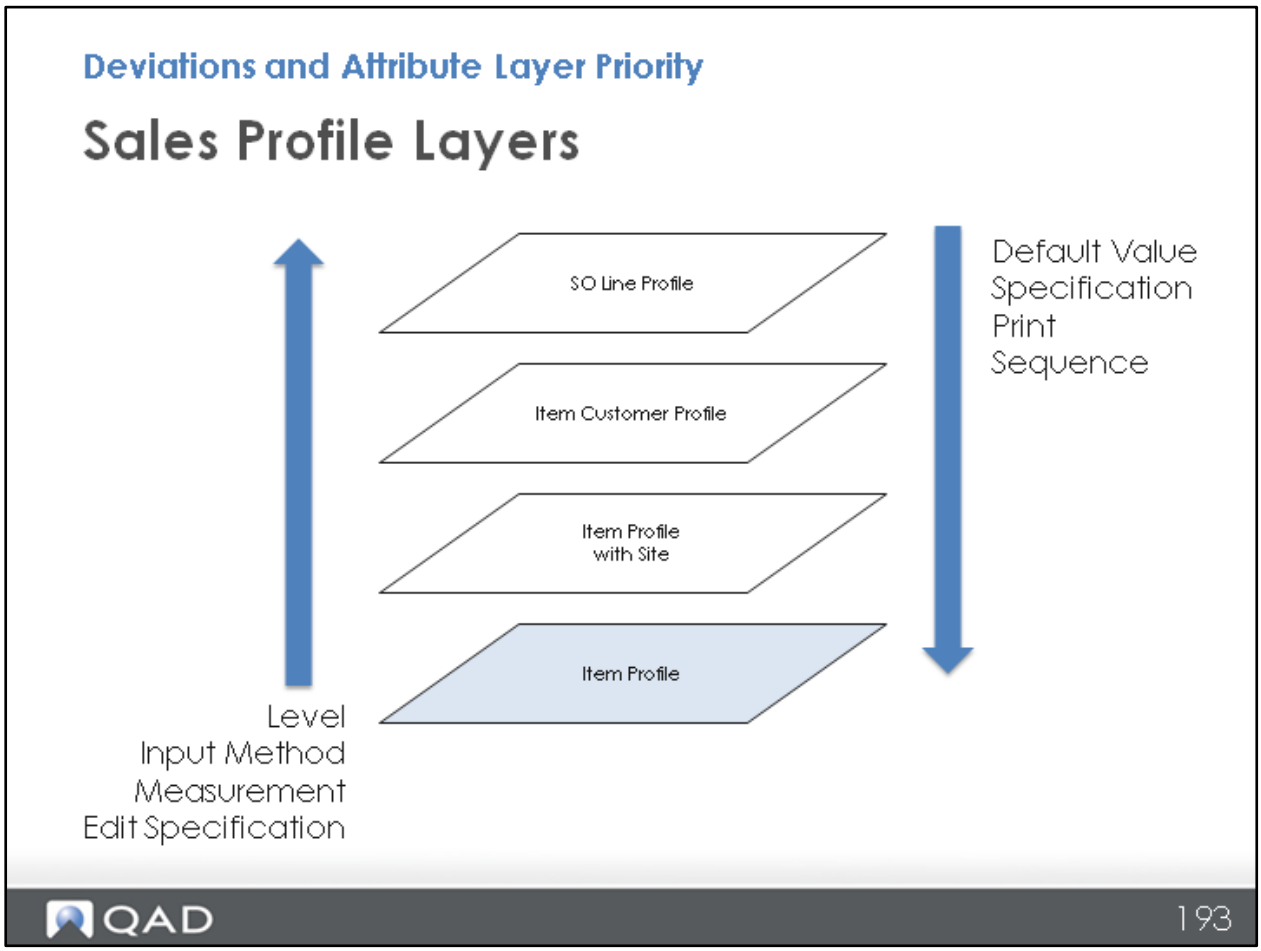


Sales order lines and item customer combinations both support more specific profiles. SO Line Profiles and Item Customer Profiles both allow you to specify attributes to certain item combinations.

As before, these profiles also have layers and sub-layers which carry priority. In addition, Item Customer Profiles have the additional Ship-to sub-layer.

Priority follows the flow shown above.

Sales Profile Layers

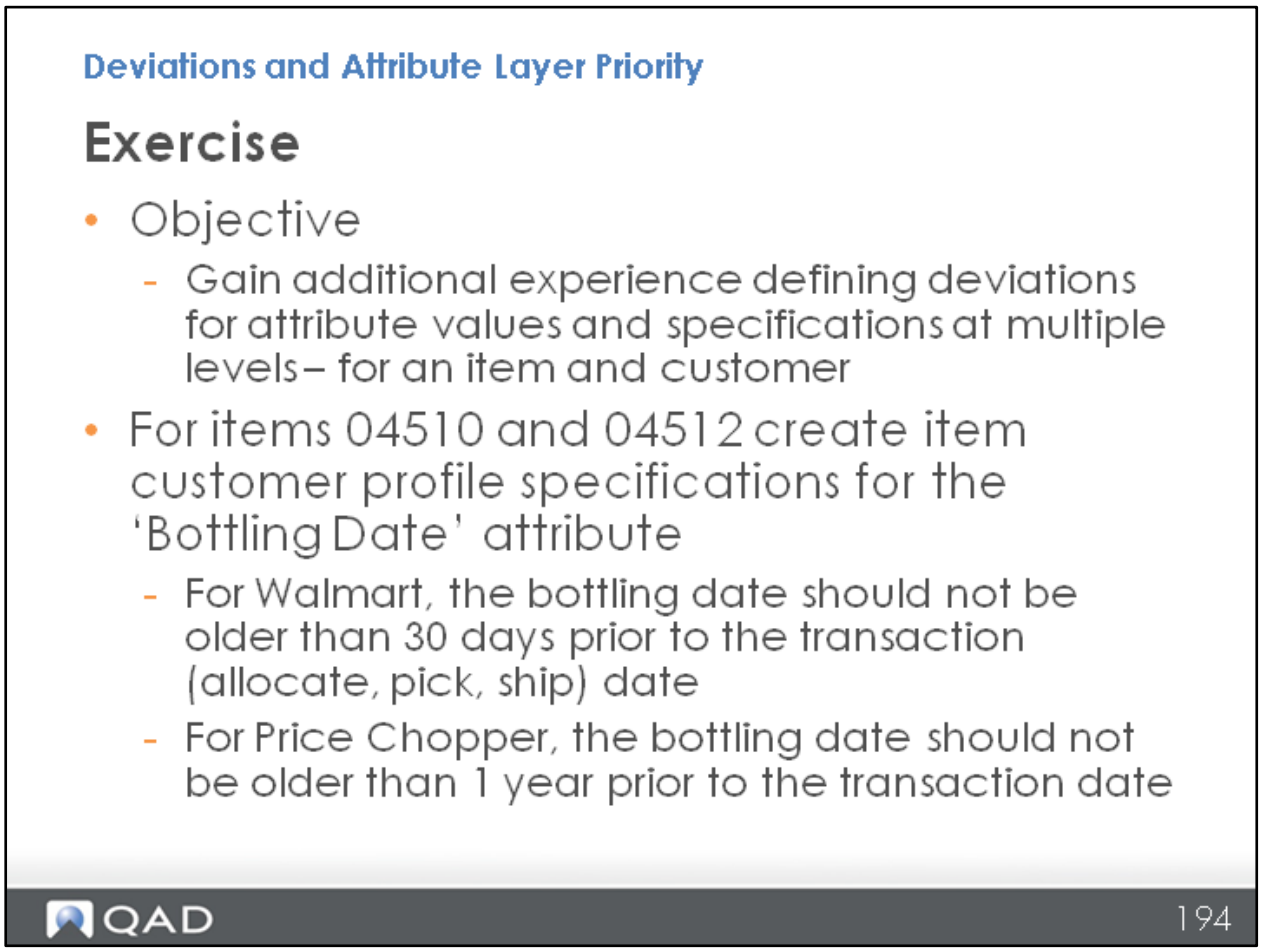


Again, field values cascade up or down depending on the field type.

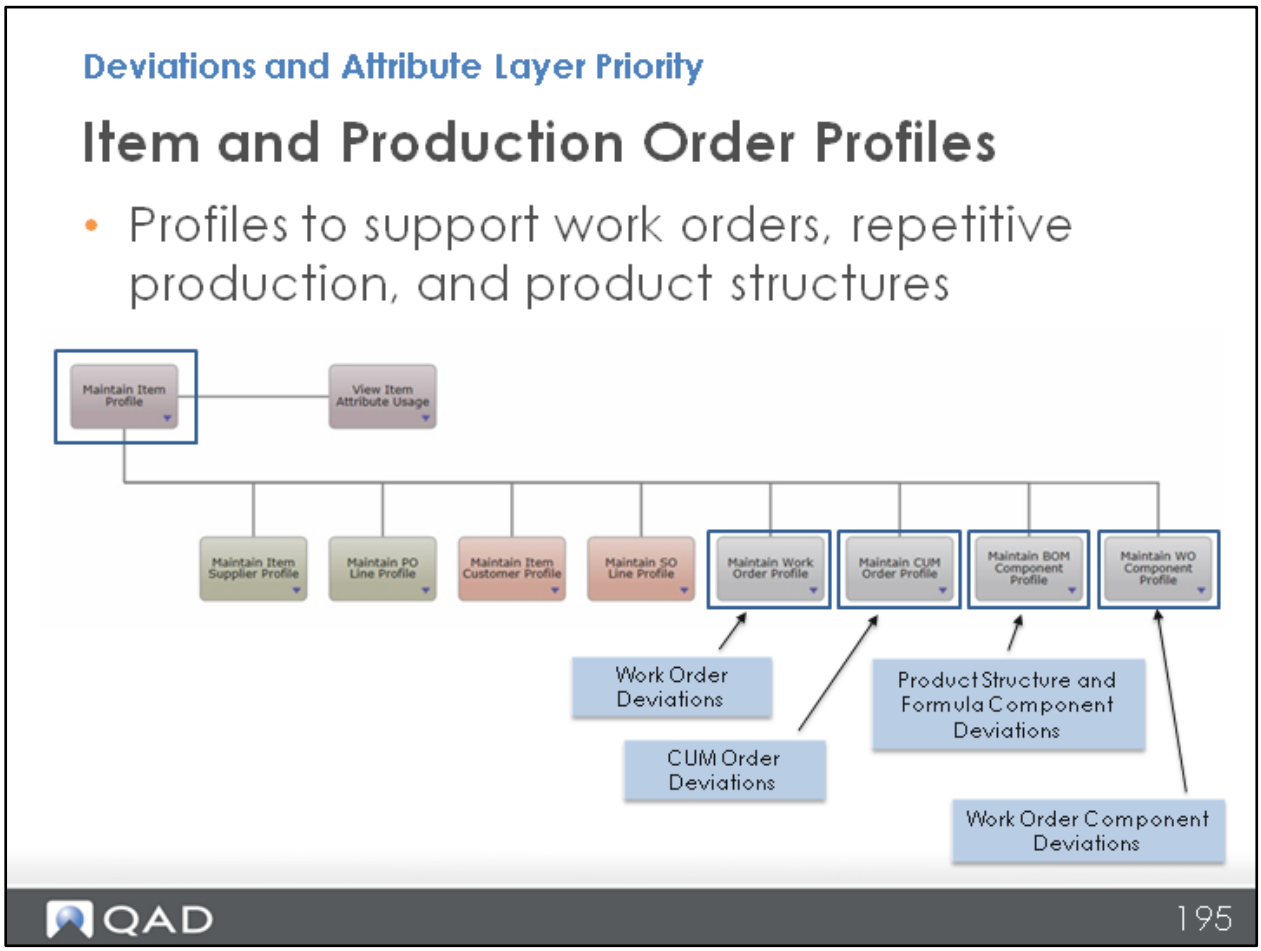
In the case of Default Value, Specification, Print, and Sequence, the highest layer has priority. This means that the field value of the highest layer cascades down.

In the case of Level, Input Method, Measurement, Edit Specification, the lowest layer has priority. This means that the field value of the lowest layer cascades up.

Exercise


Deviations and Attribute Layer Priority
Exercise
Objective
Gain additional experience defining deviations for attribute values and specifications at multiple levels– for an item and customer
For items 04510 and 04512 create item customer profile specifications for the 'Bottling Date' attribute
For Walmart, the bottling date should not be older than 30 days prior to the transaction (allocate, pick, ship) date
For Price Chopper, the bottling date should not be older than 1 year prior to the transaction date
QAD
194

Item and Production Order Profiles



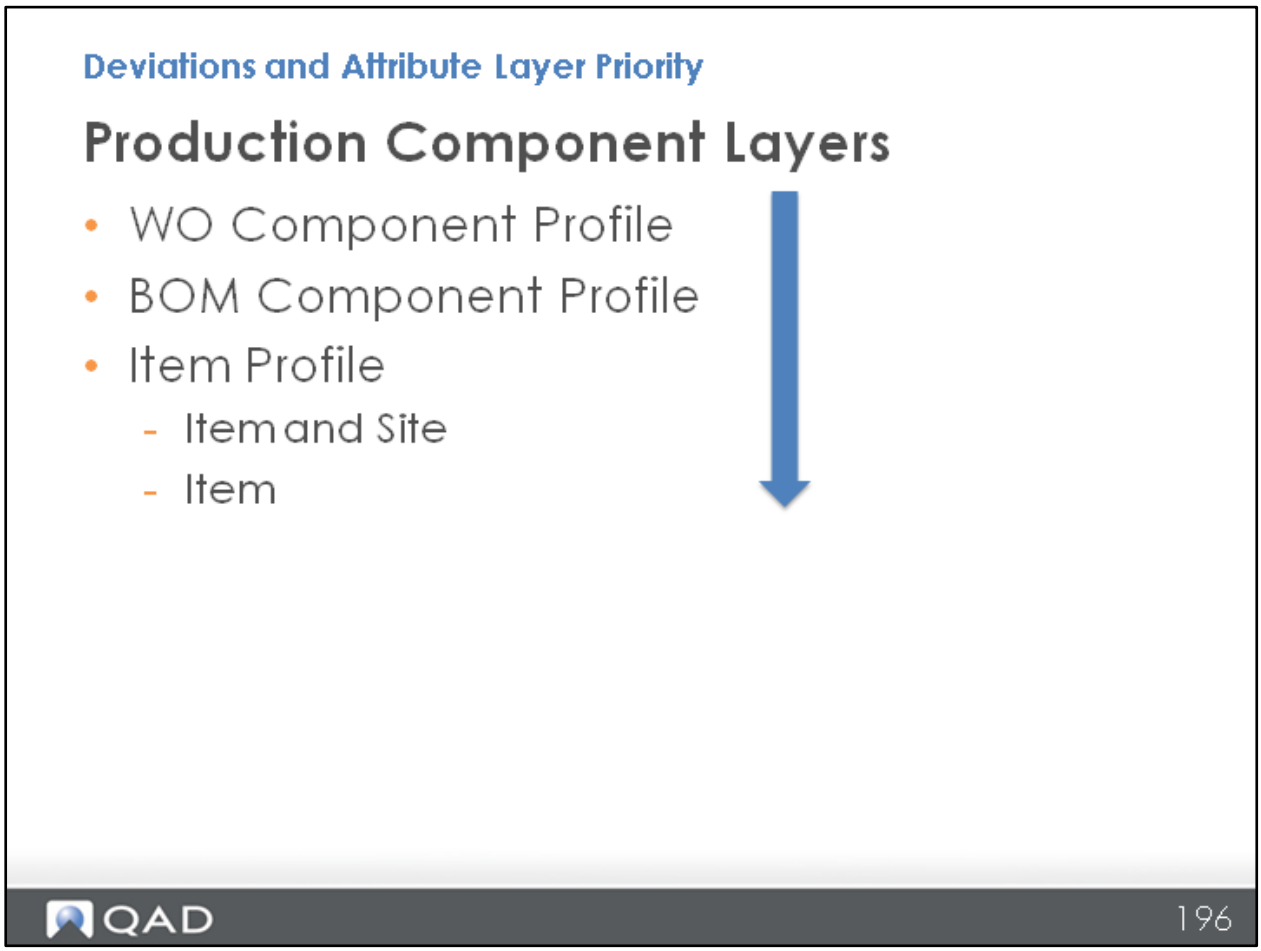
Production profiles include two collections for managing deviations for what is produced and received:

- Maintain Work Order Profile
- Maintain CUM Order Profile

Production profiles also include collections for components and raw materials required for production:

- Maintain BOM Component Profile
- Maintain WO Component Profile

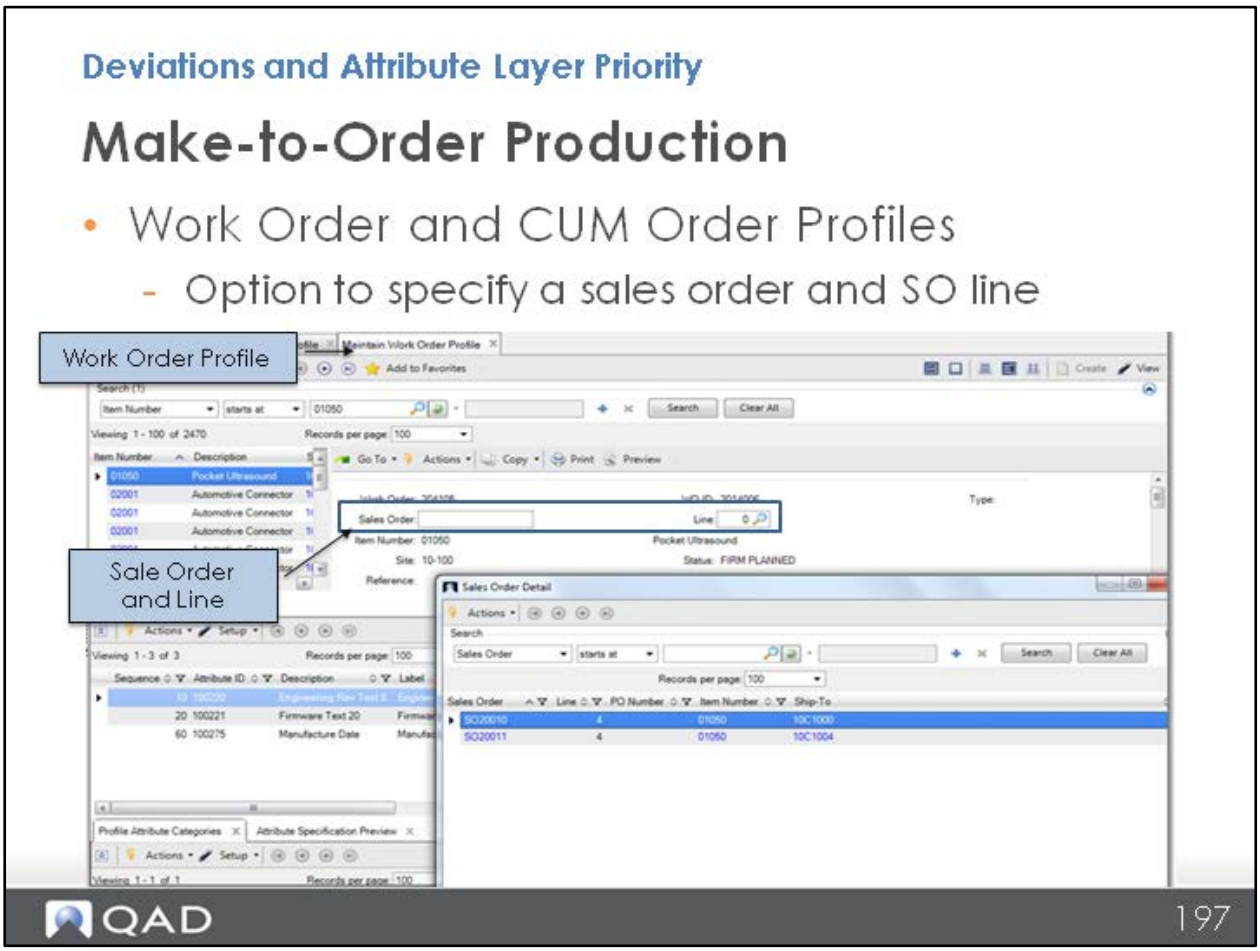
Production Component Layers



The WO Component Profile and BOM Component Profile allow you to specify attributes that apply to specific production components.

The WO Component Profile layer has the highest priority. The next highest is the BOM Component Profile layer. The lowest priority layer for production components contains the Item Profile sub-layers.

Make-to-Order Production

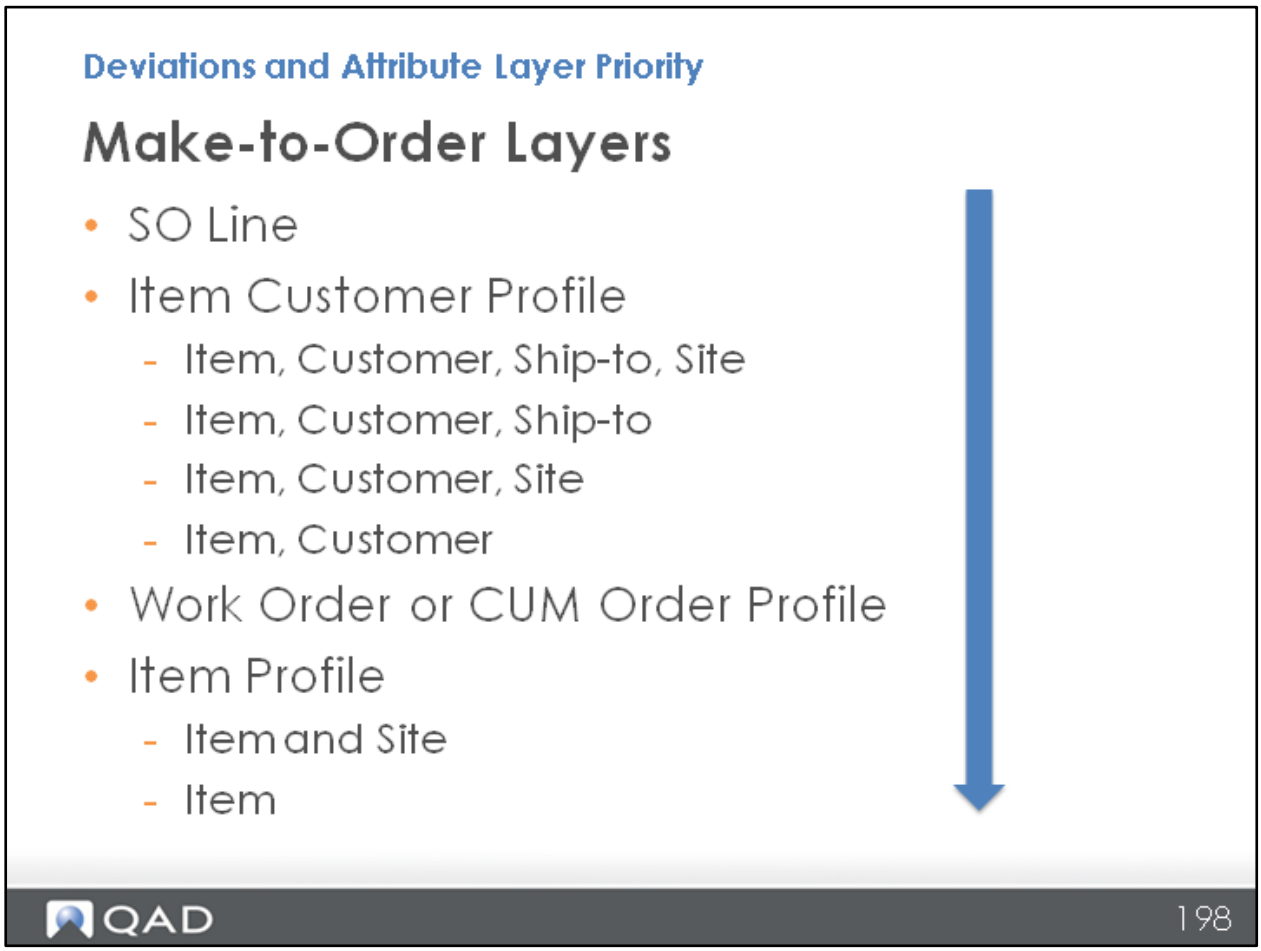


Make-to-Order production incorporates several of the priority layers which you have covered so far.

To process a Make-to-Order sales order, enter a sales order when entering or editing a work order profile.

The option to specify a sales order and SO line provides linkage to profiles defined for the SO line and customer

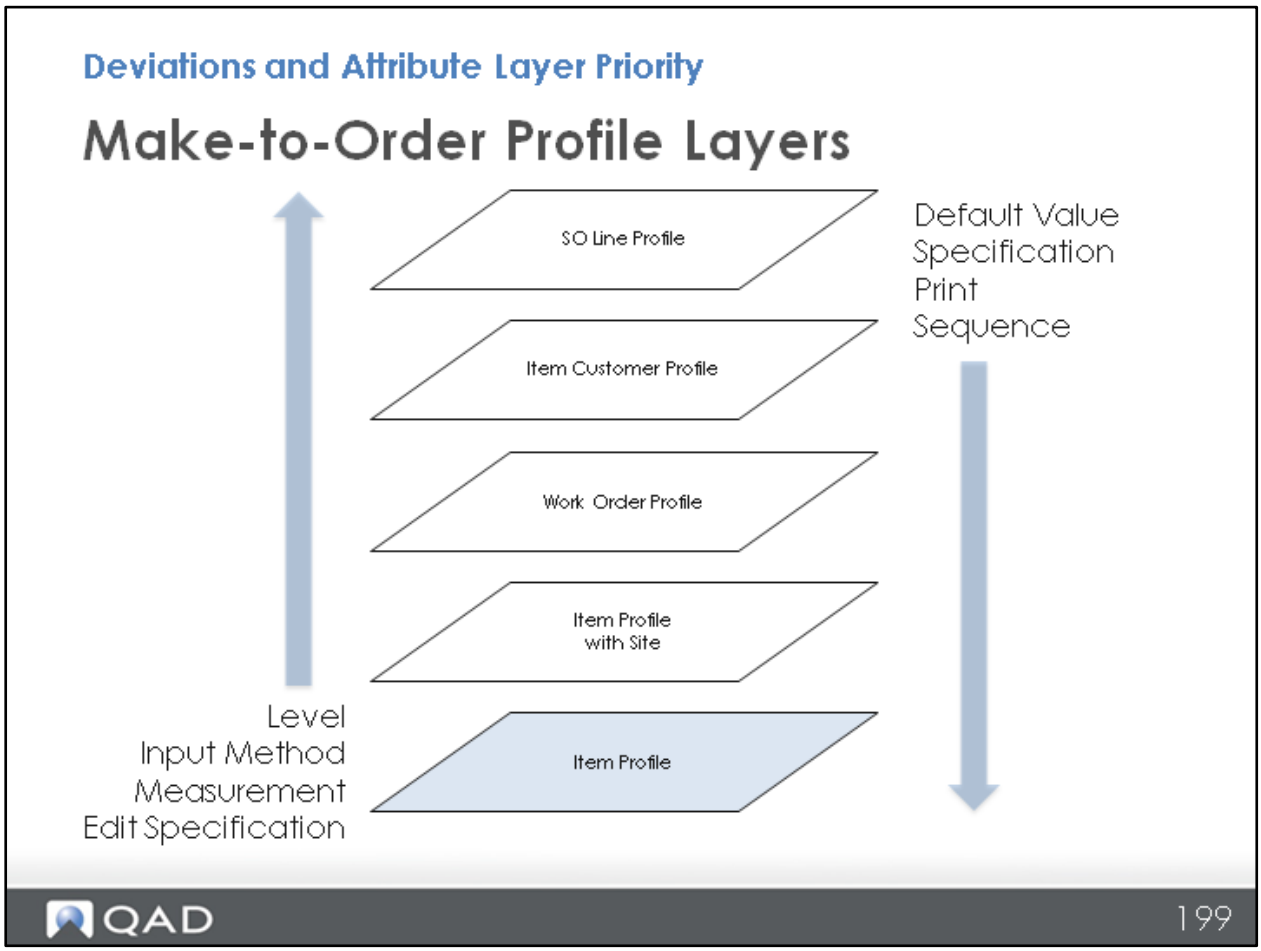
Make-to-Order Layers



A Make-to-Order line incorporates both an SO line and a work order or CUM order. As such, it combines priority layers for both concepts.

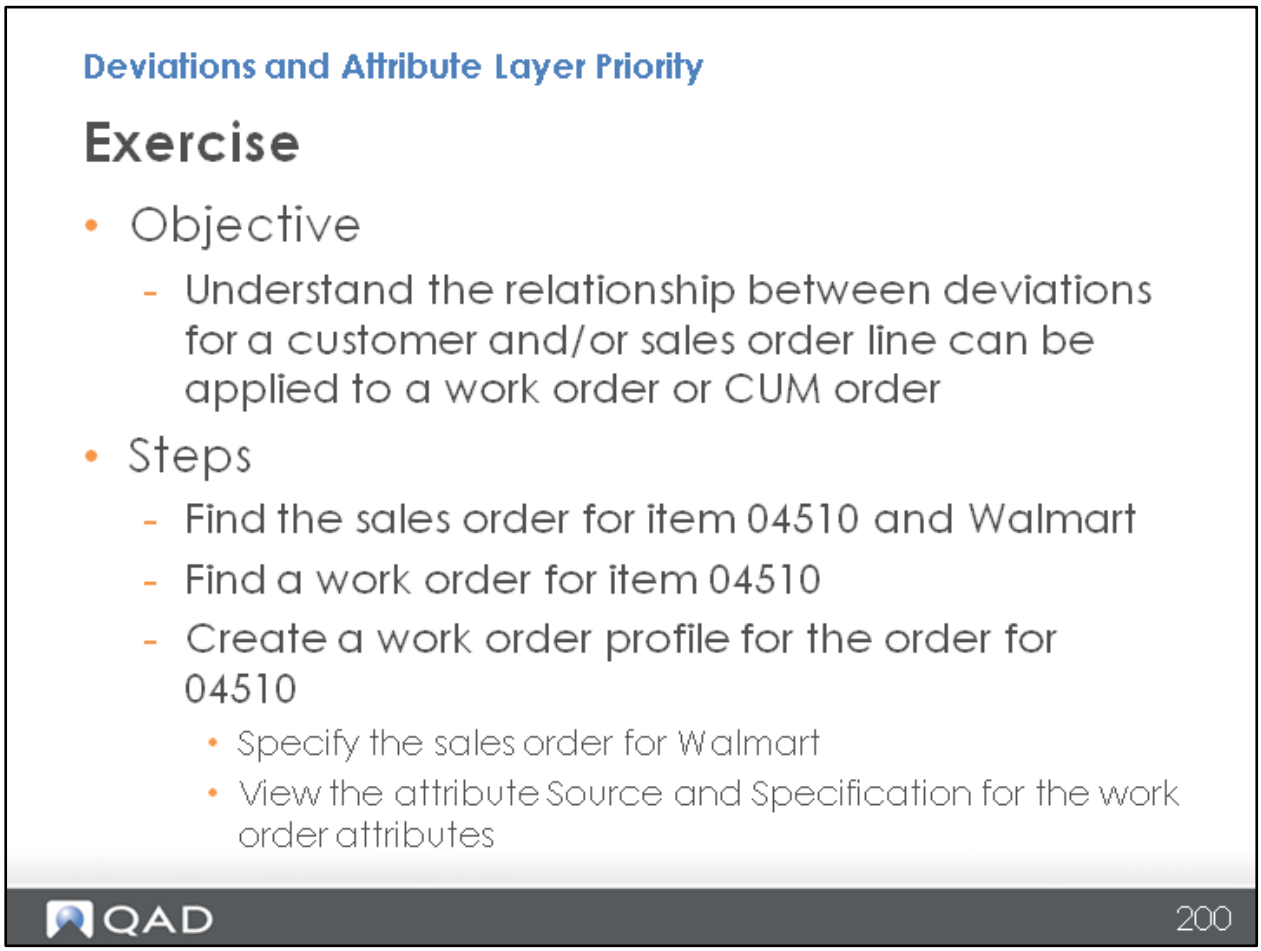
The SO Line Profile and Item Customer Profile have higher priority than the Work Order or CUM Order profile, as do their sub-layers. Item Profile, as always, is the most general concept and has the lowest priority.

Make-to-Order Profile Layers

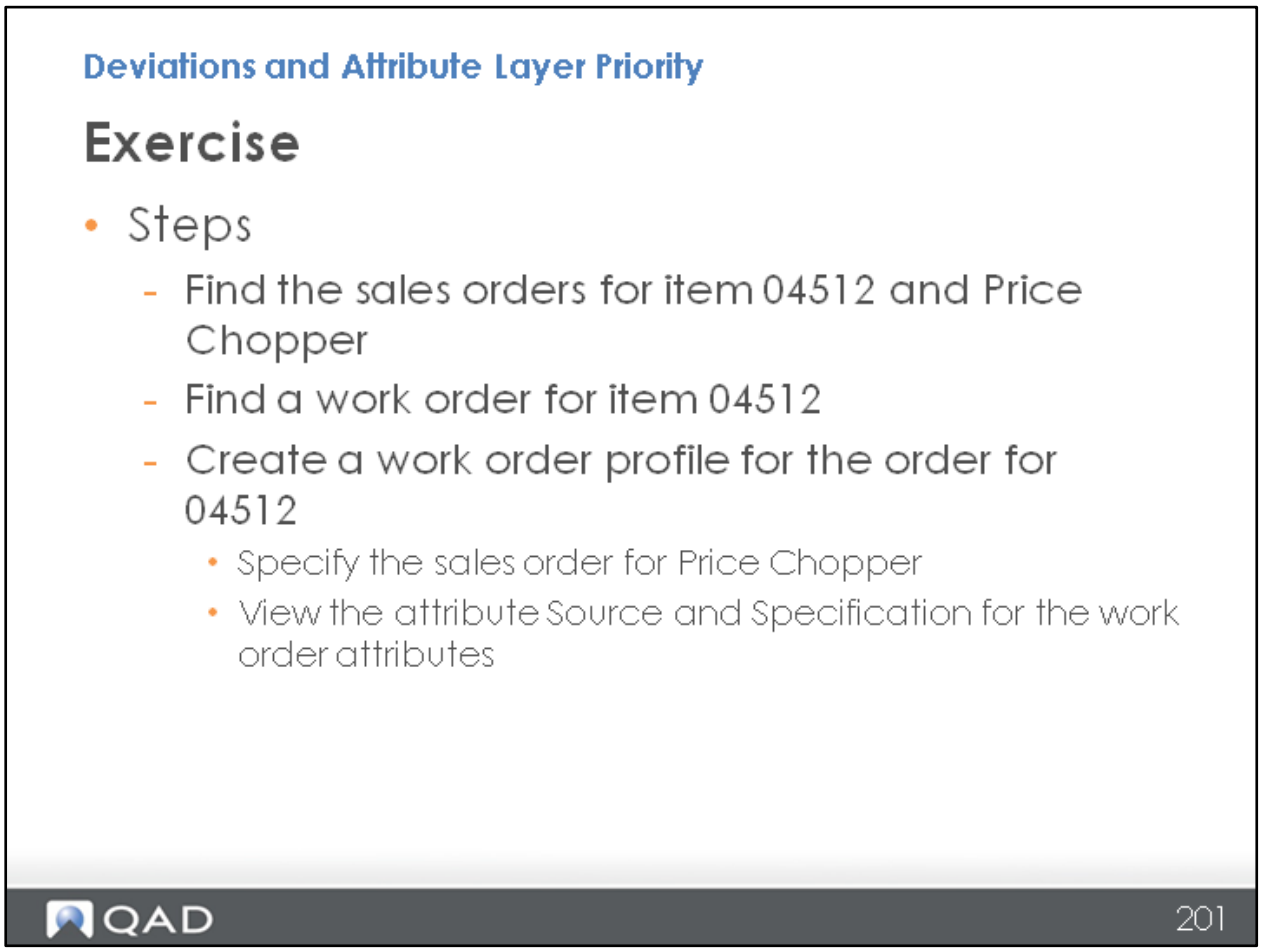


Once again, values cascade up or down the layers of priority depending on the field type.

Exercise


Deviations and Attribute Layer Priority
Exercise
Objective
Understand the relationship between deviations for a customer and/or sales order line can be applied to a work order or CUM order
Steps
Find the sales order for item 04510 and Walmart
Find a work order for item 04510
Create a work order profile for the order for 04510
Specify the sales order for Walmart
View the attribute Source and Specification for the work order attributes
QAD
200

Exercise


Deviations and Attribute Layer Priority
Exercise
Steps
Find the sales orders for item 04512 and Price Chopper
Find a work order for item 04512
Create a work order profile for the order for 04512
Specify the sales order for Price Chopper
View the attribute Source and Specification for the work order attributes
QAD
201

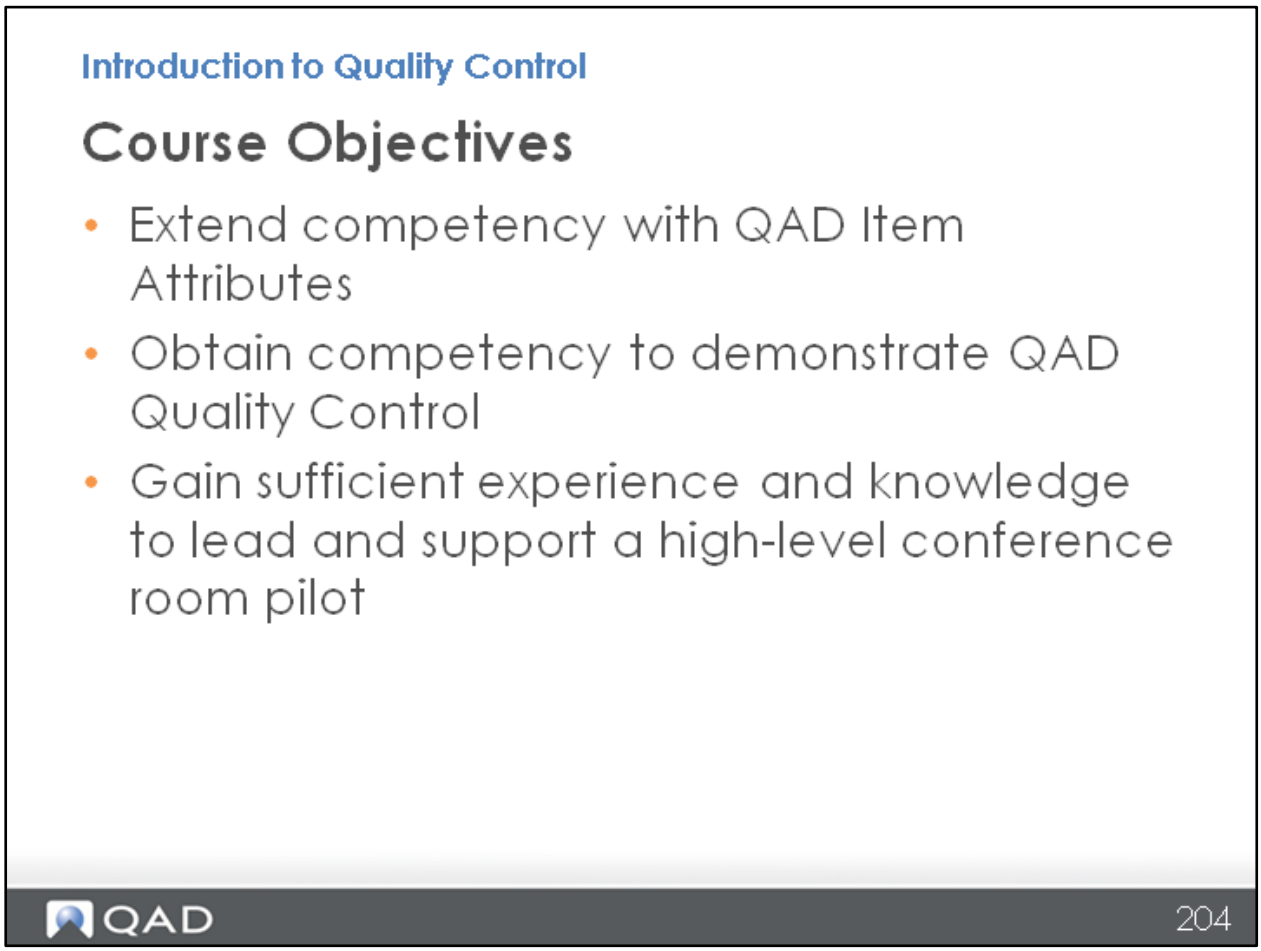
CHAPTER 9

Quality Control

Introduction Quality Control

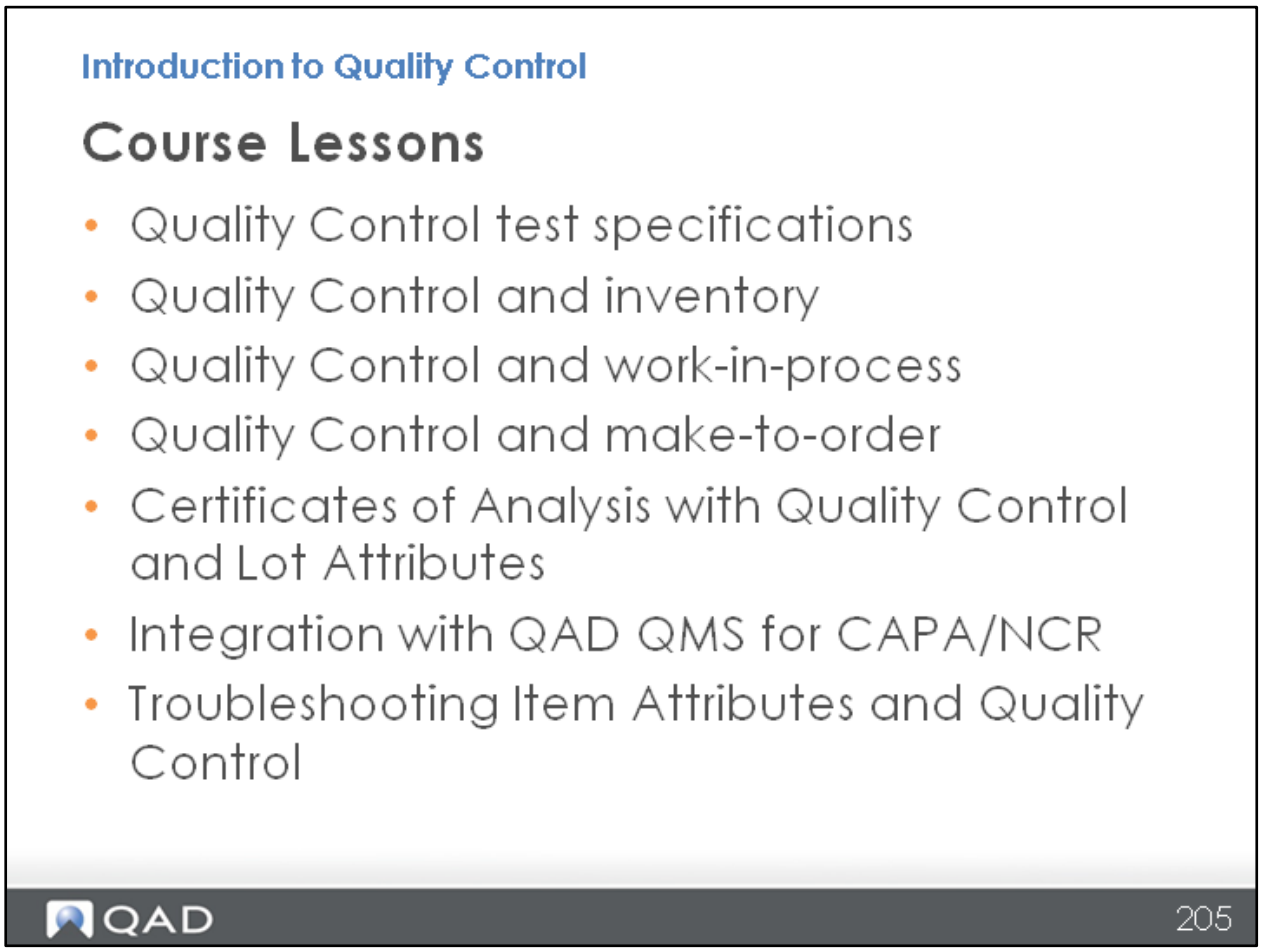
Business Tasks

Course Objectives

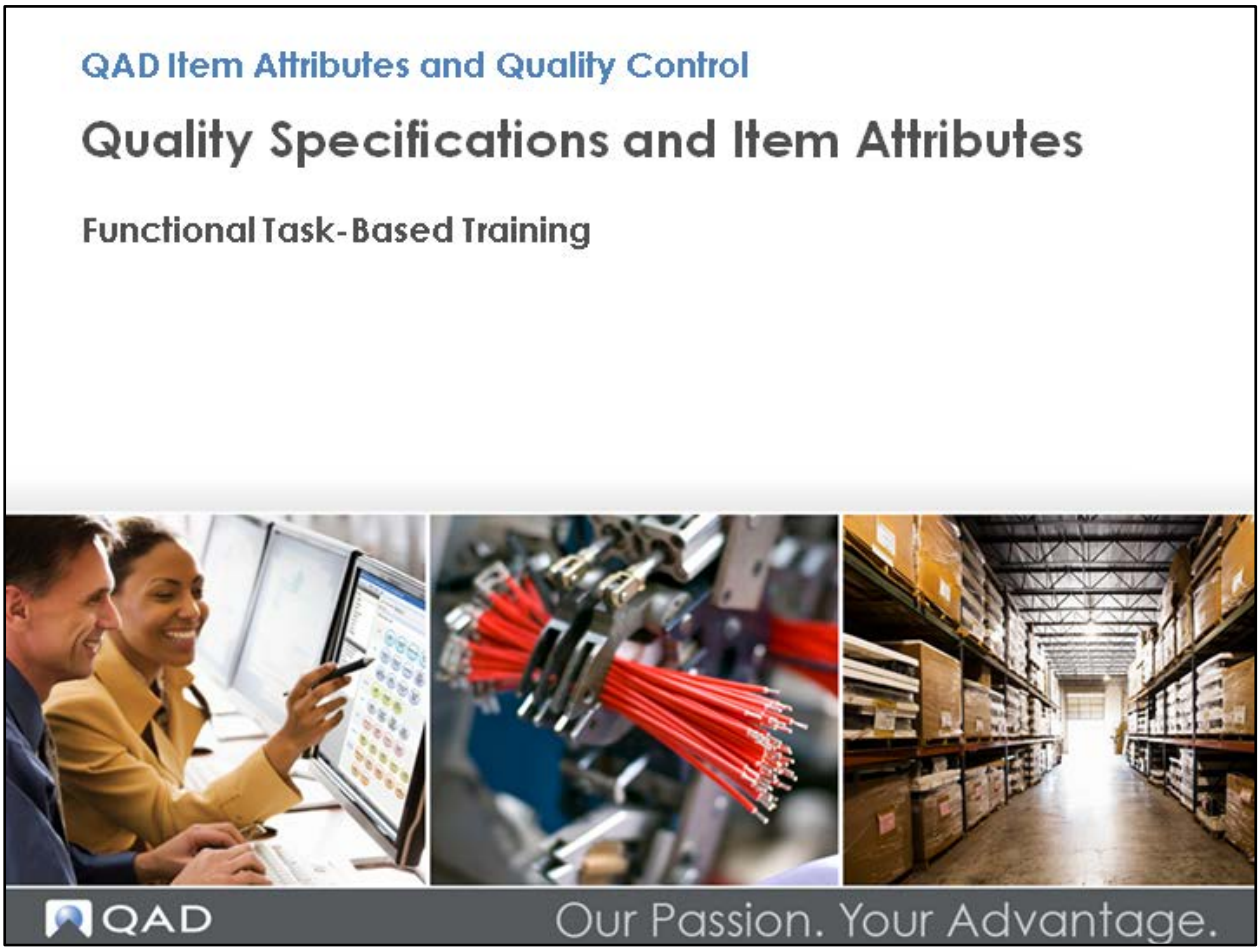


Presumes basic competency with QAD Item Attributes

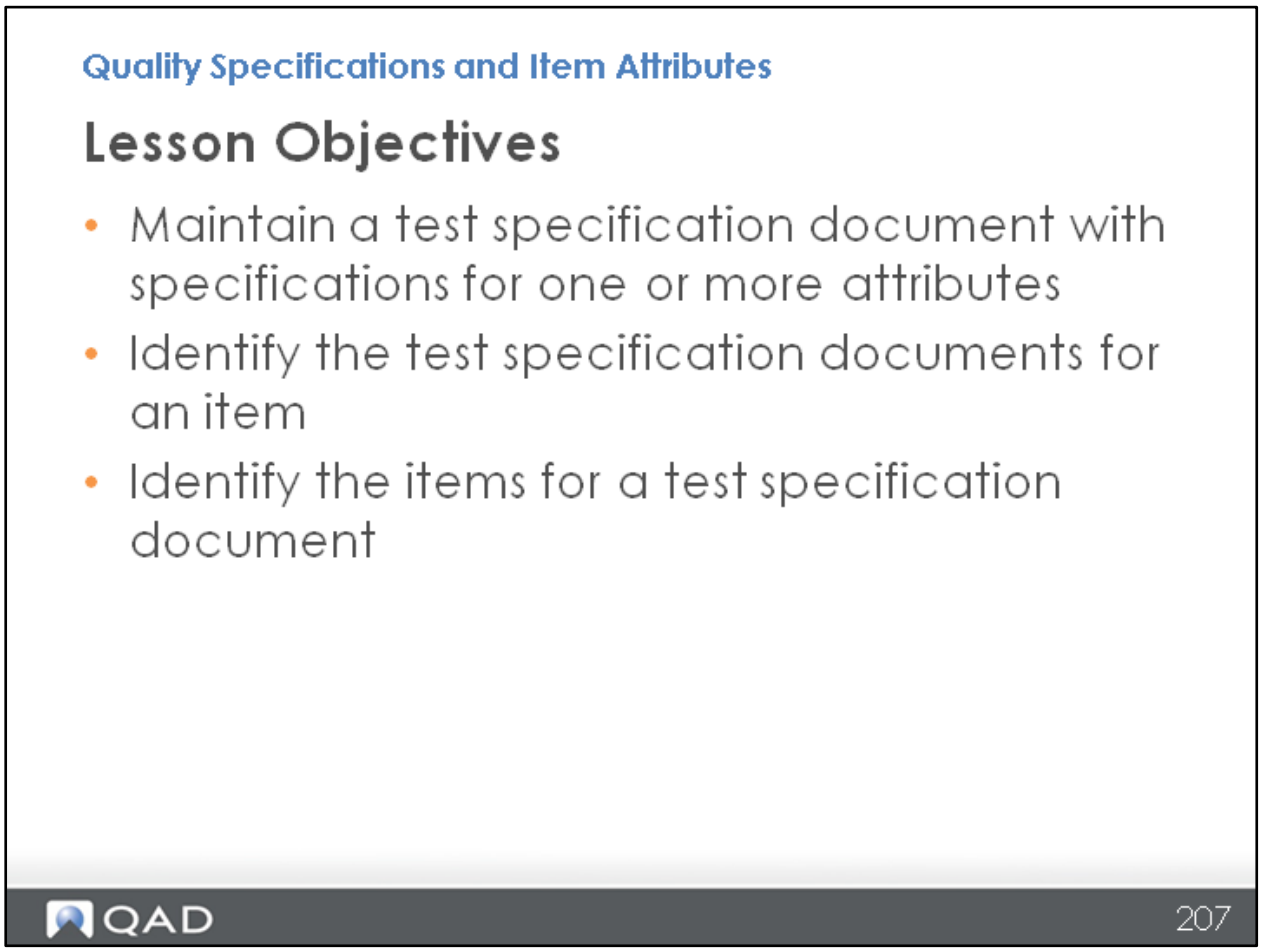
Course Lessons



Quality Specifications and Item Attributes



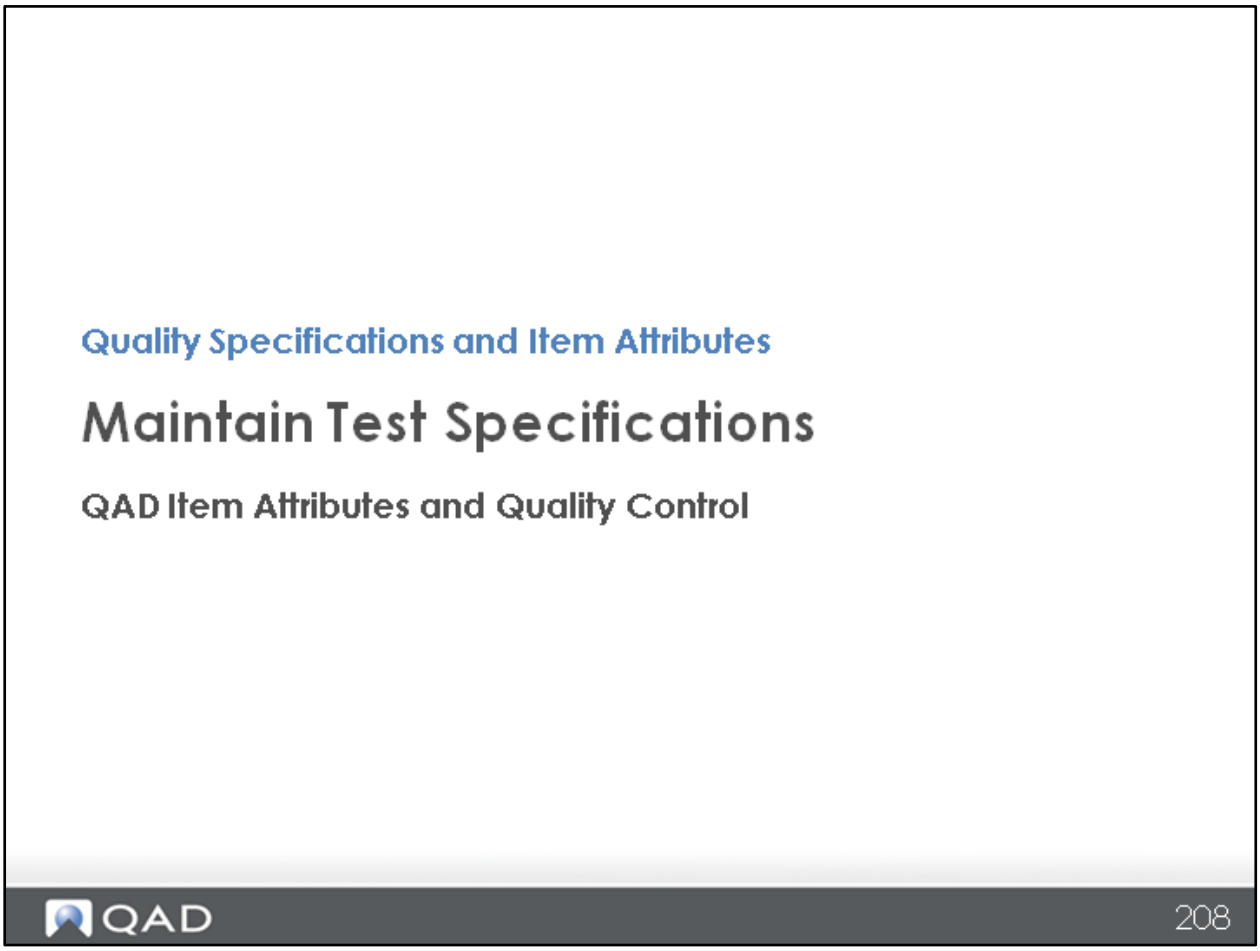
Lesson Objectives



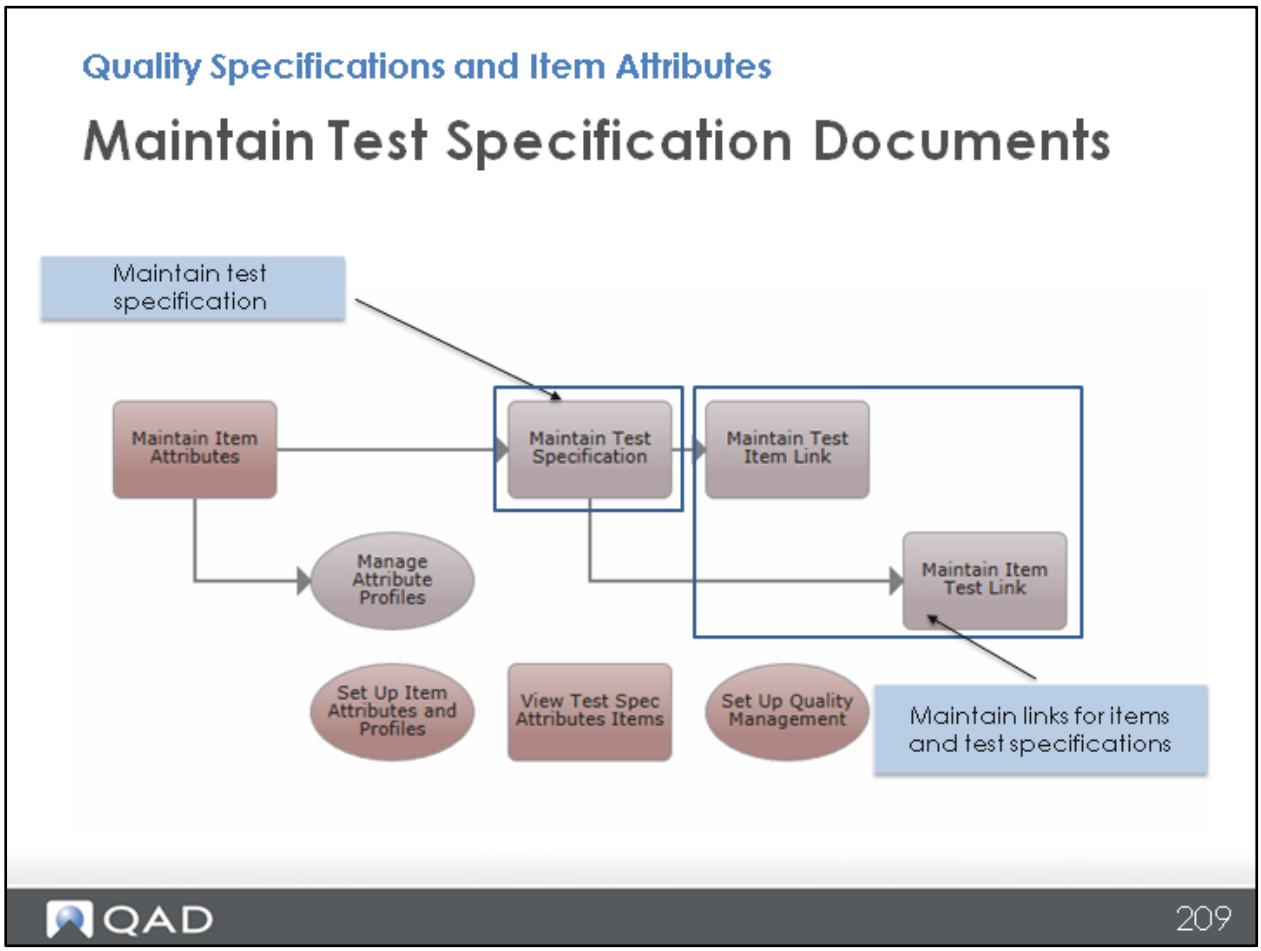
At the end of this section of training, you will be able to build test specifications. Test specifications are the instructions which direct quality control.

Test specifications contain attributes associated with a certain quality process. By associating them with items, you can attach those attributes to lots for that item.

Maintain Test Specifications



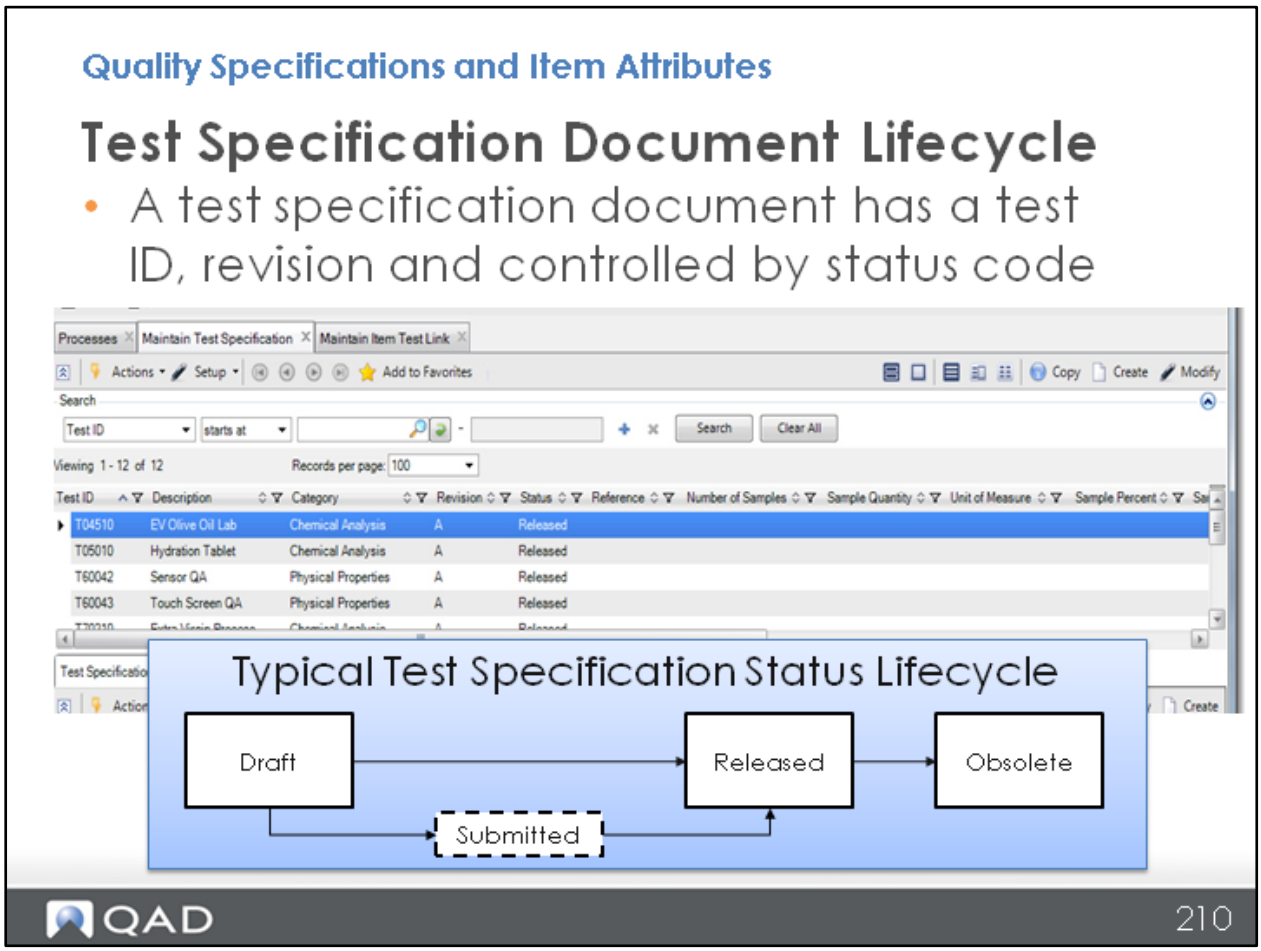
Maintain Test Specification Documents



Access the process maps which control test specifications here:

Home > Manage Enterprise Item Attributes > Set Up Item Attributes and Profiles > Manage Test Specifications

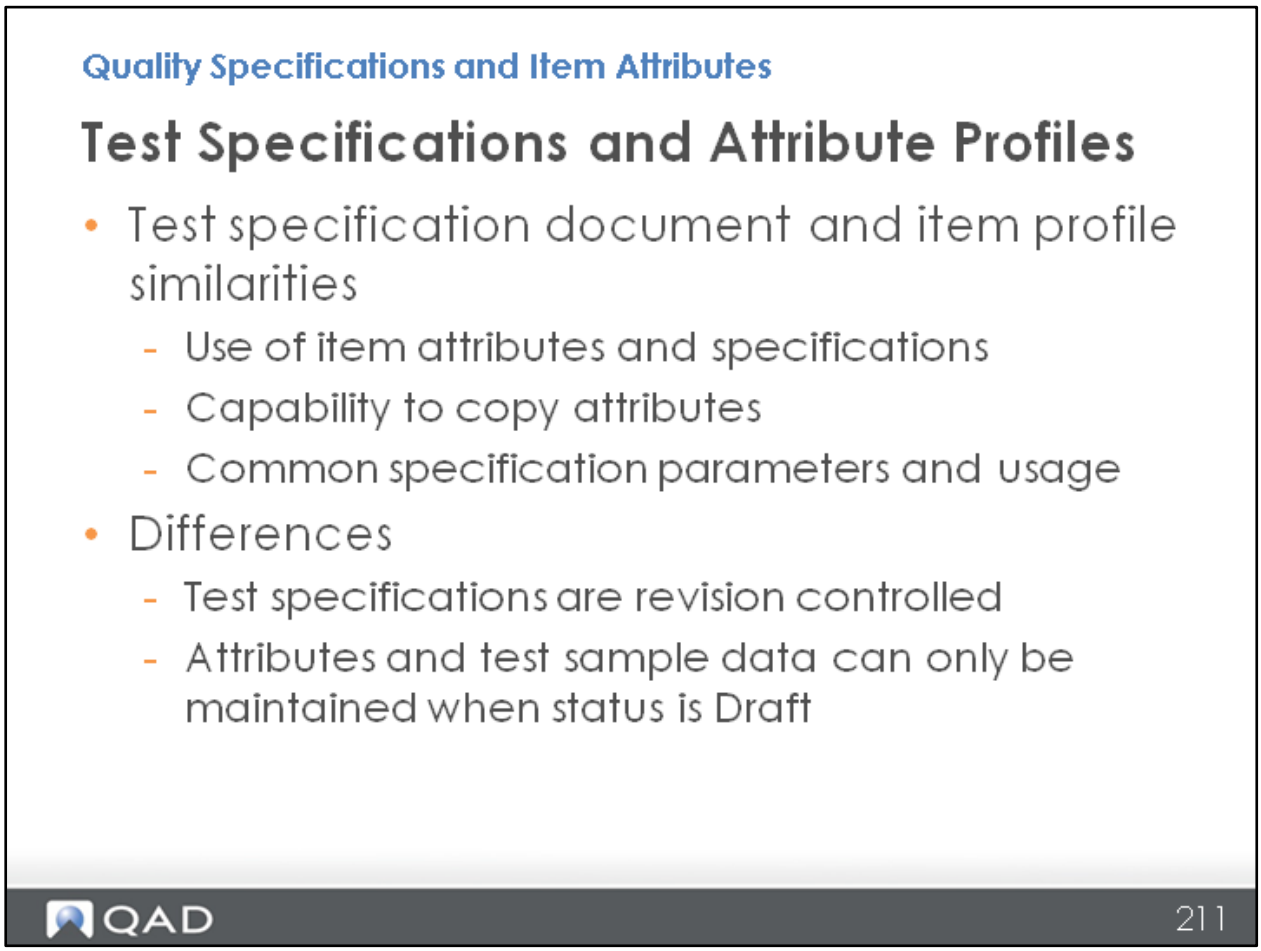
Test Specification Document Lifecycle



A test specification document is identified by its test ID and revision and controlled by using a status code.

The diagram shows the typical lifecycle of a test specification.

Test Specifications and Attribute Profiles

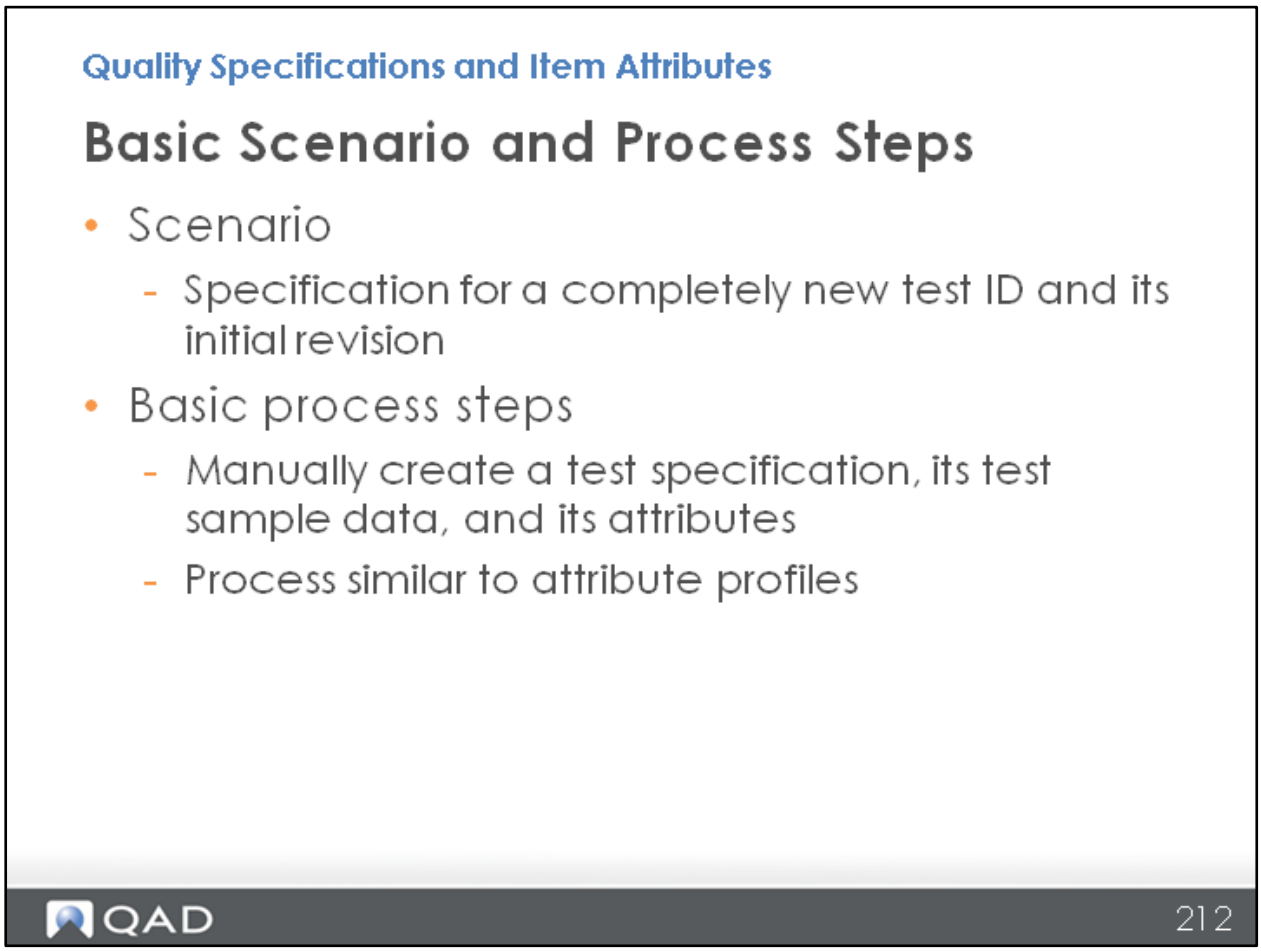


There are several key differences and similarities between Test Specifications and Attribute Profiles.

Each use item attributes to build specifications. In this way, each builds sets of attributes with values and conforming data. Each can copy attributes from other specifications or profiles. Each use the same type of attributes and have similar usages.

Where they differ, however, are in elements of their version control. Test specifications are controlled through revisions. Each specification can have multiple revisions, and only the revision in the Released status is used. The attribute data within them is only editable while the specification is in the Draft status.

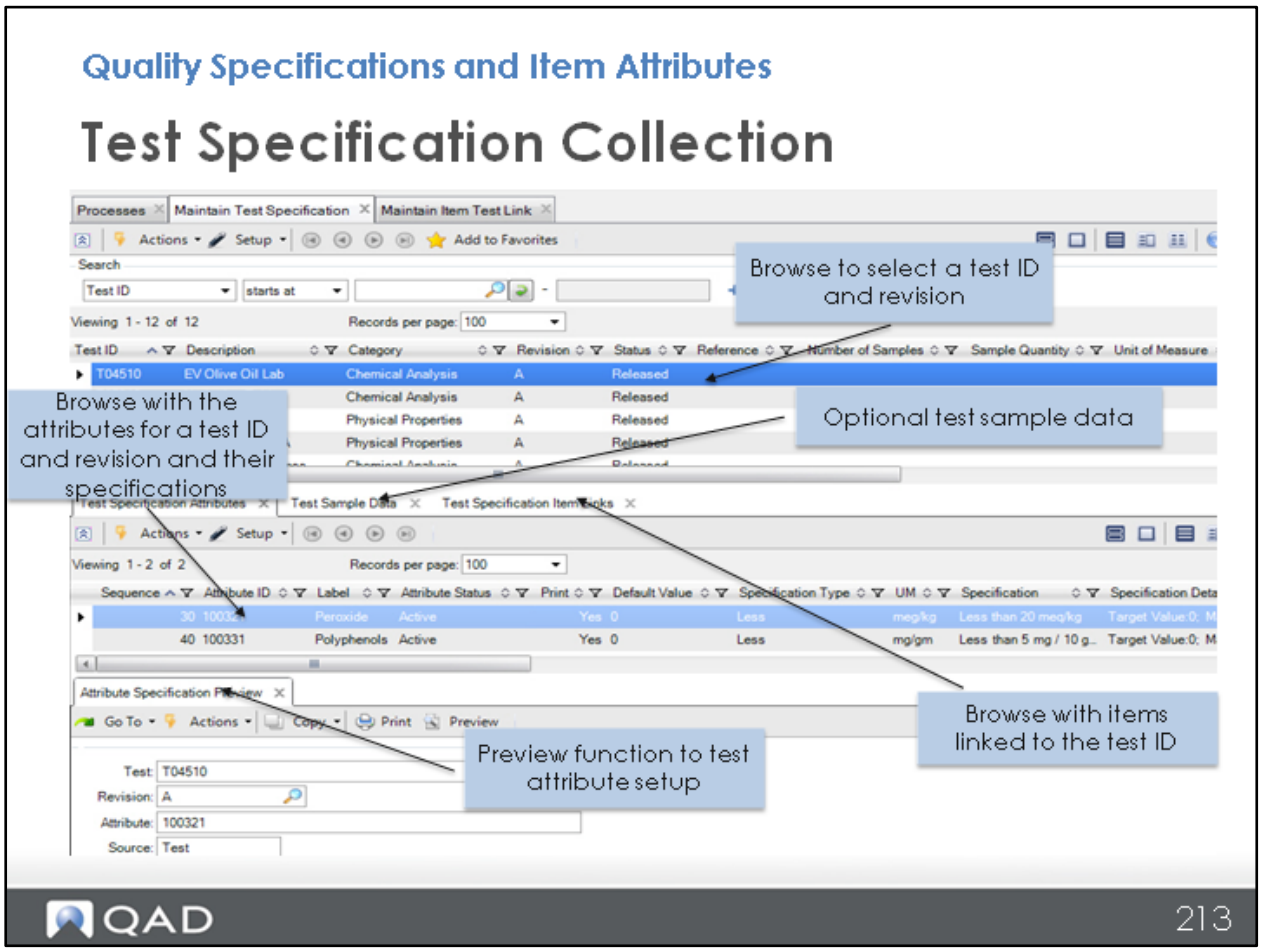
Basic Scenario and Process Steps



There are multiple methods for creating a test specification.

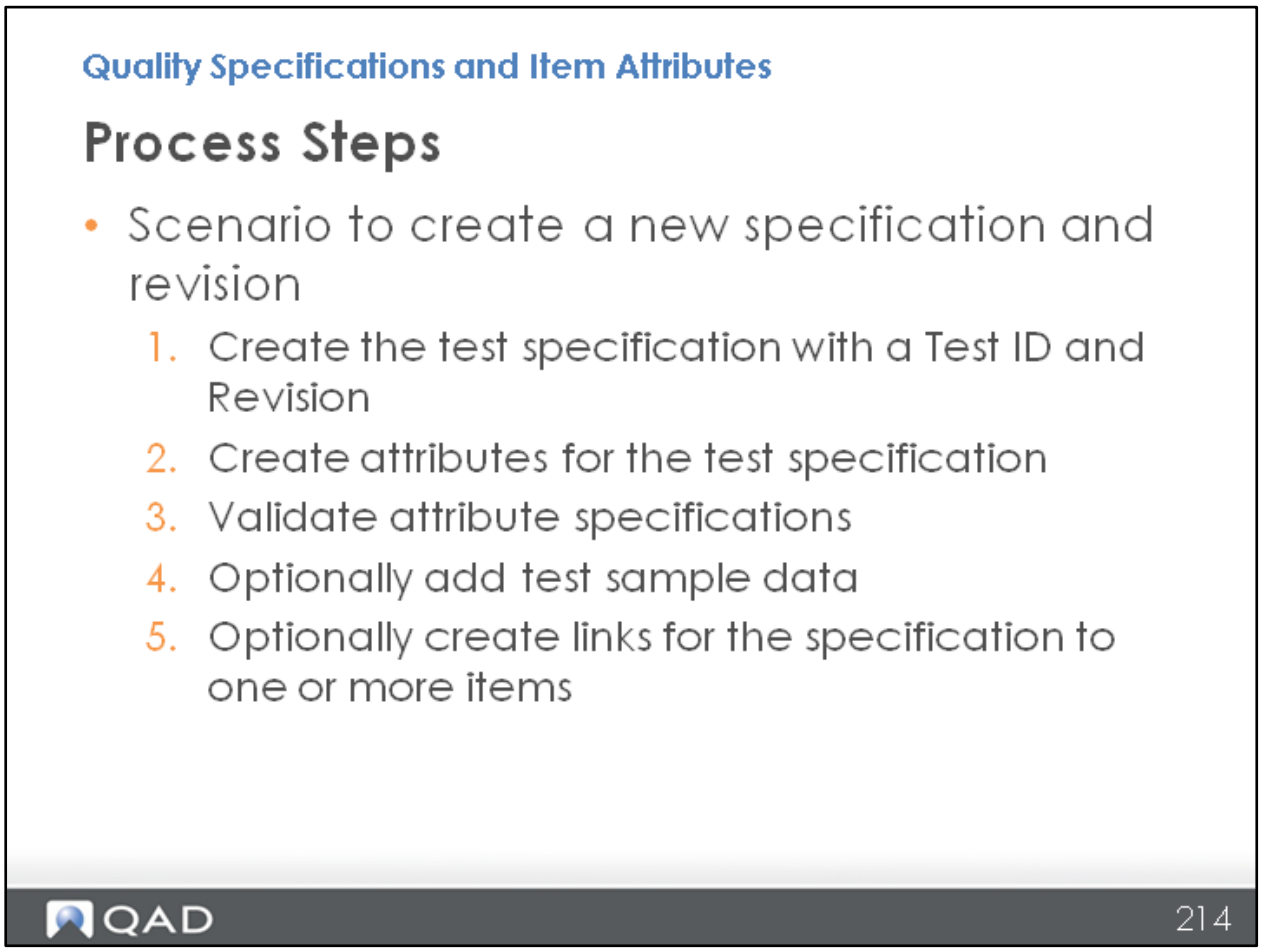
The first is to create a test specification manually. This process is similar to attribute profiles; you add attributes and conforming values.

Test Specification Collection

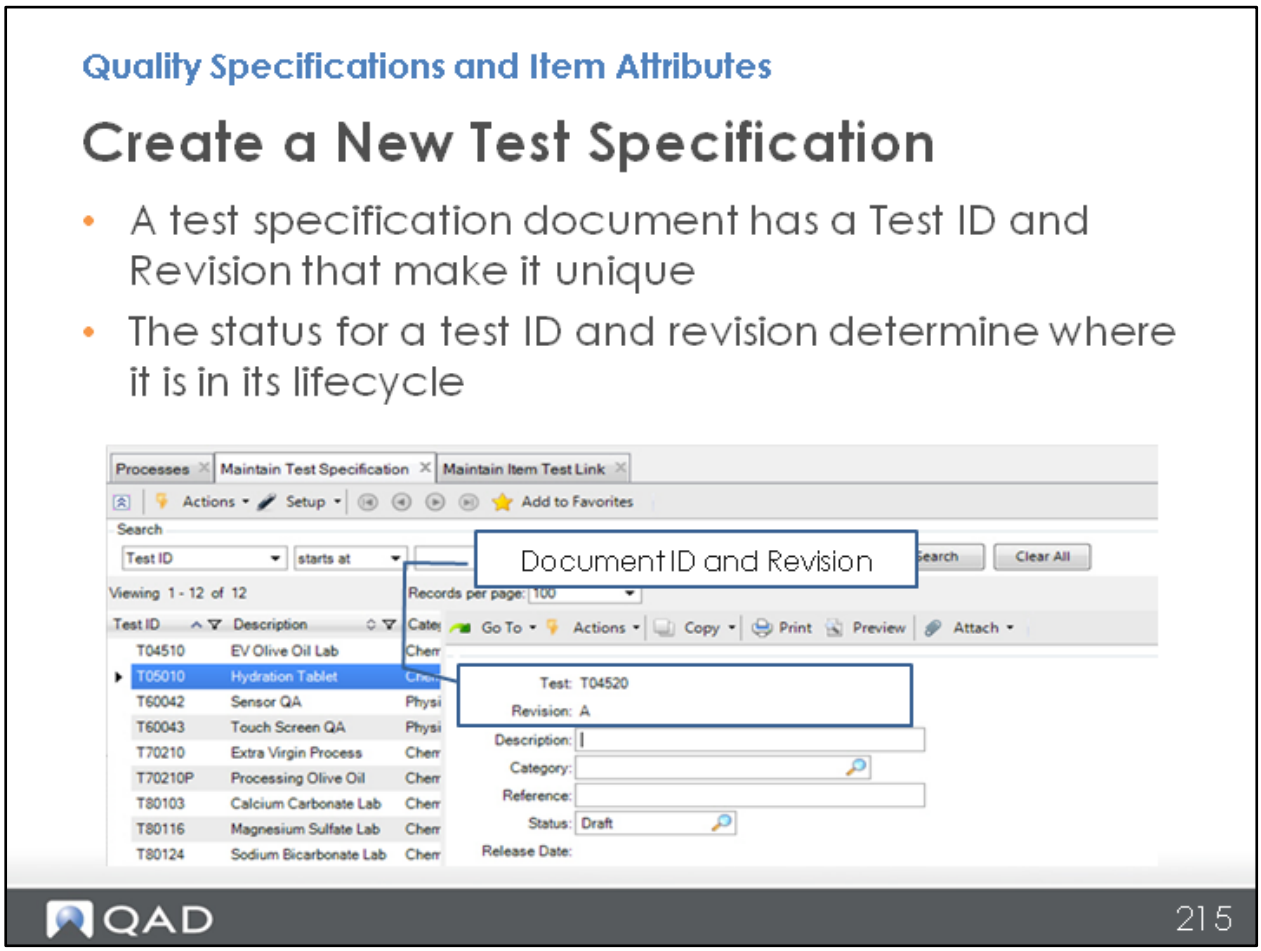


The test specification collection grants browse access to the attributes for a test ID and revision, sample data, and linked items.

Process Steps



Create a New Test Specification

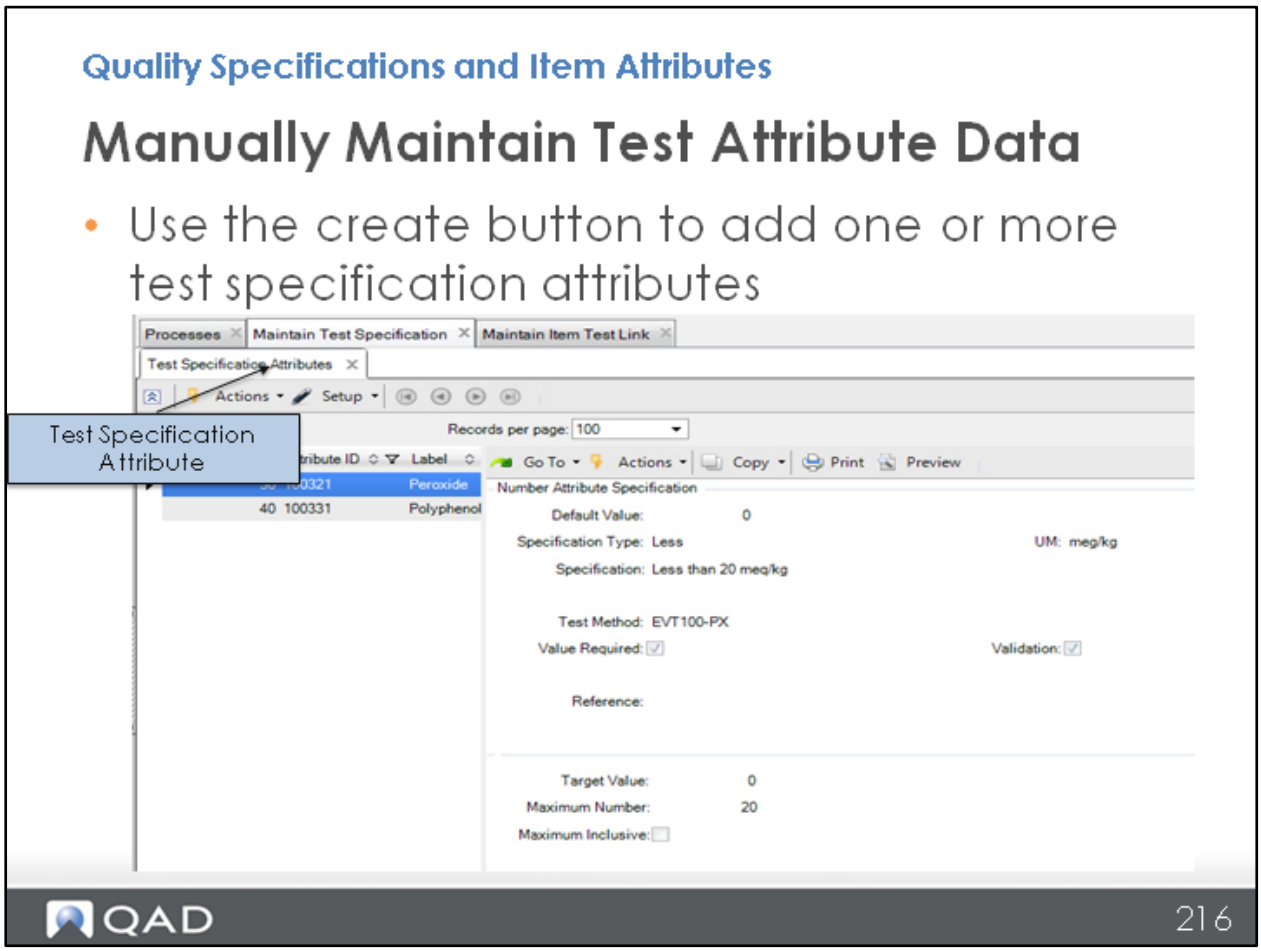


A test specification is uniquely identified by its Test ID and its Revision.

The description is fixed for all test specification revisions that share the same Test ID

Different revisions are used to control changing versions of a specific test.

Manually Maintain Test Attribute Data

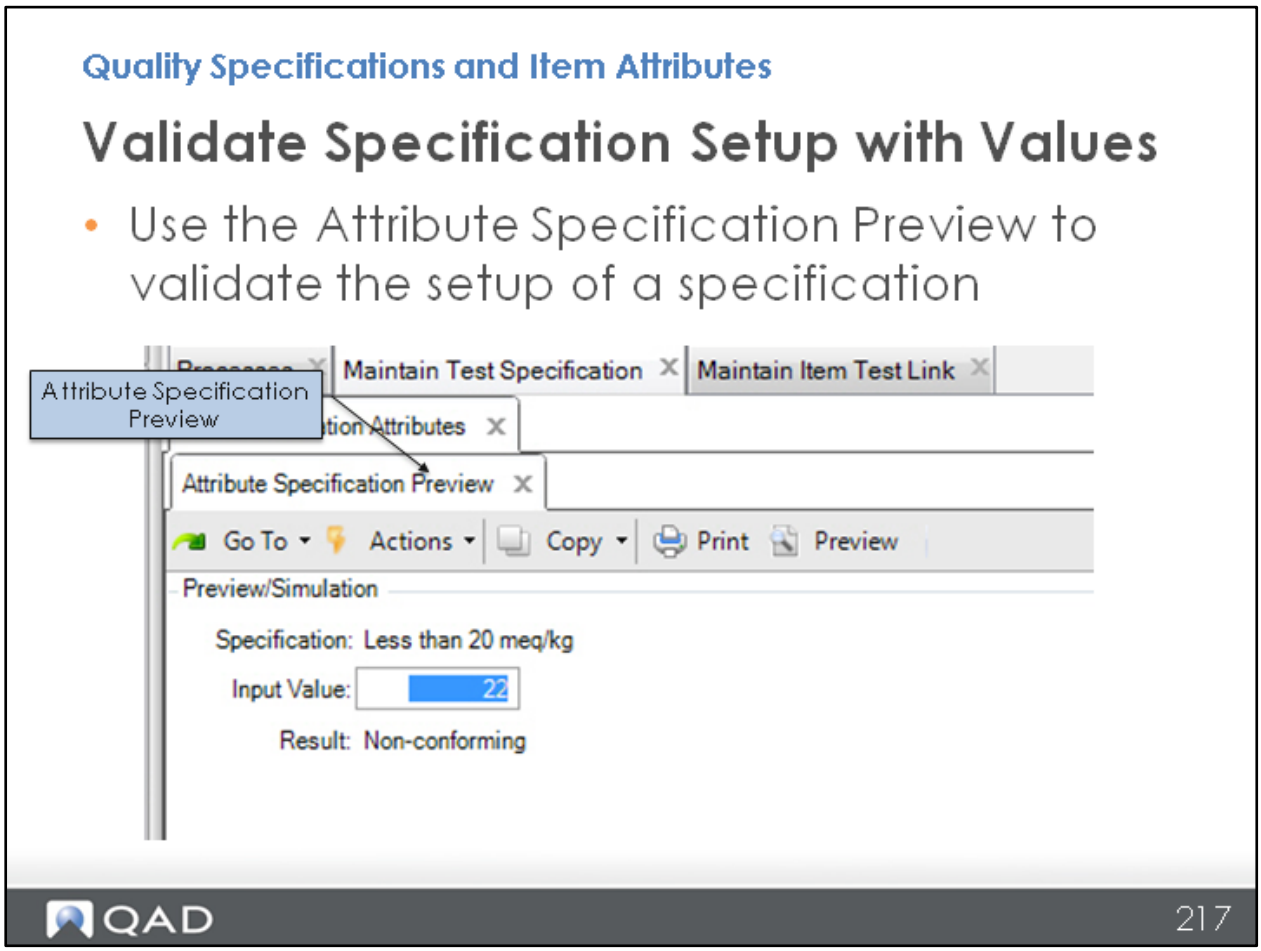


After creating a test specification, you need to add attributes.

You can do this manually using the create button.

Enter the attribute as you would for an item profile.

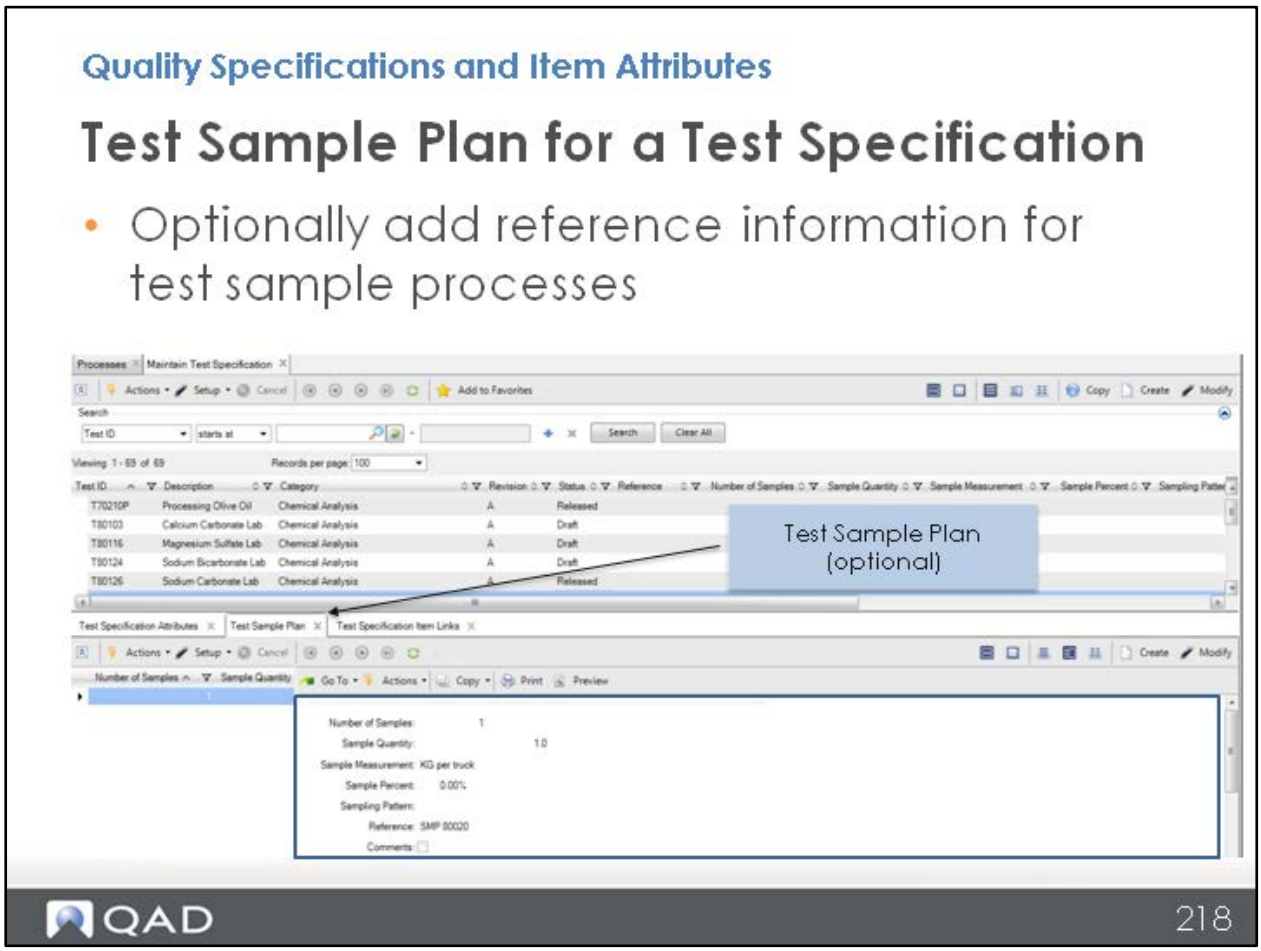
Validate Specification Setup with Values



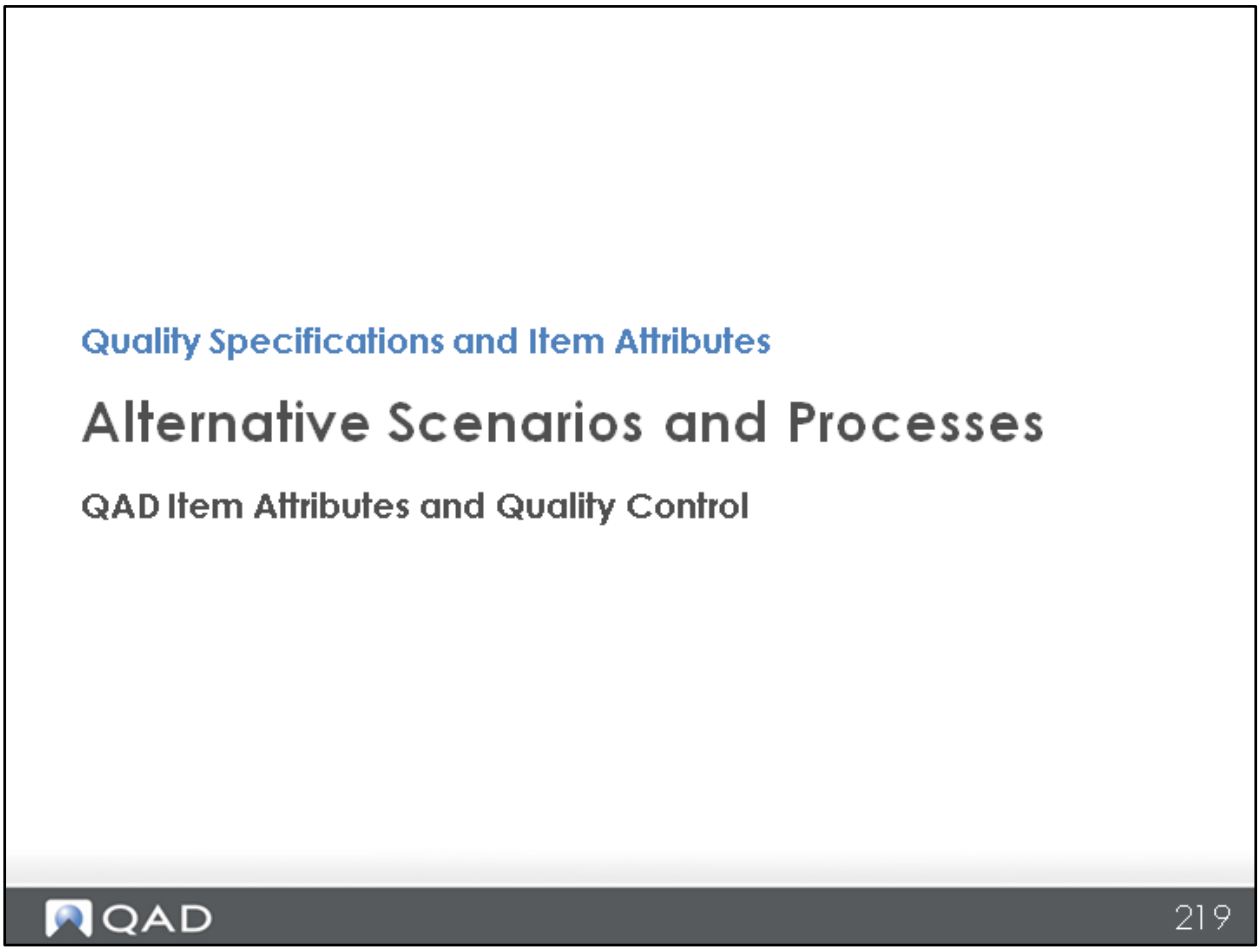
After creating an attribute, you can test it using the Attribute Specification Preview tab.

Enter a value in the Input Value field. Then, click Next. The system will inform you if the value conforms for the selected attribute.

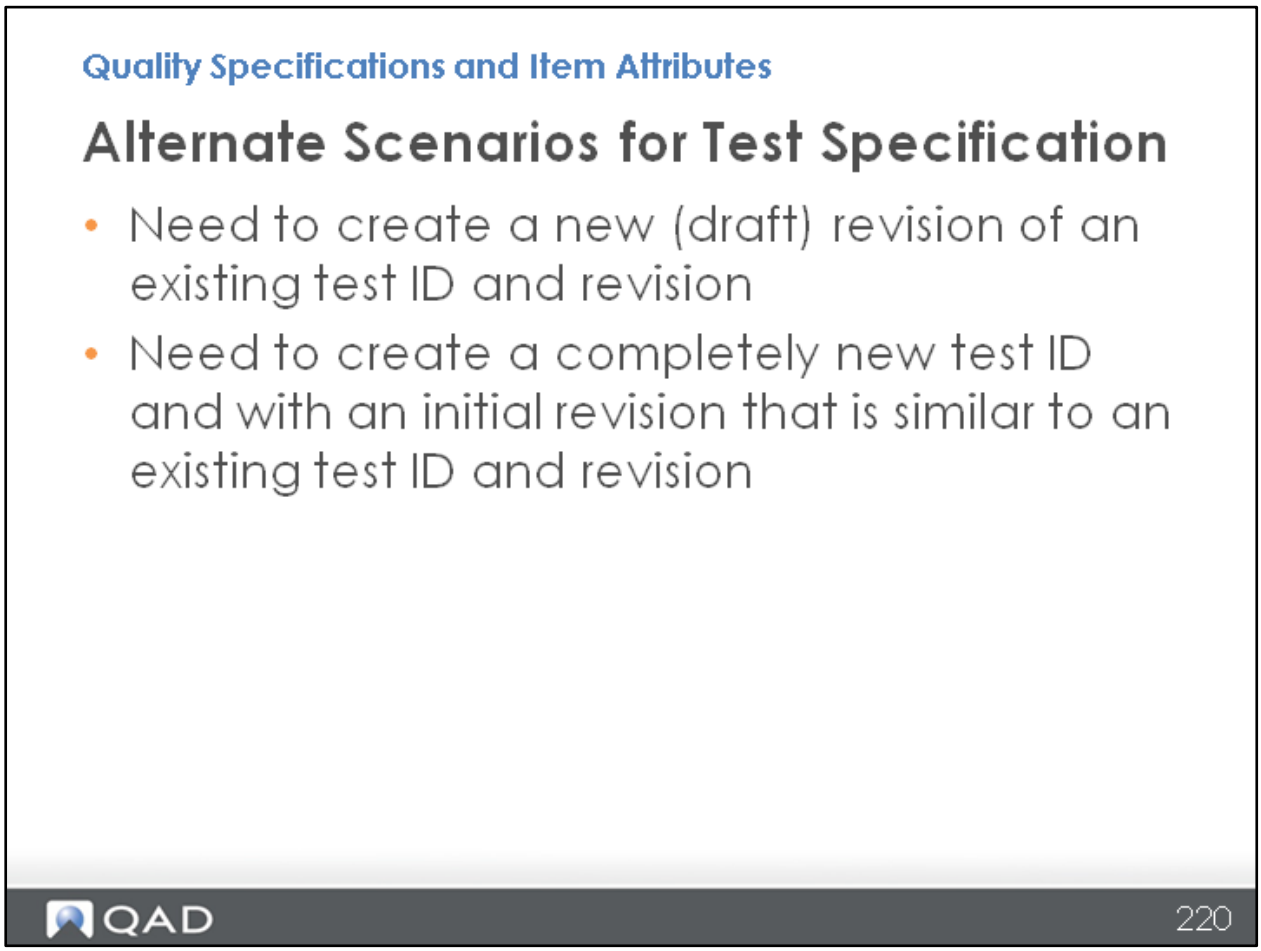
Test Sample Plan for a Test Specification



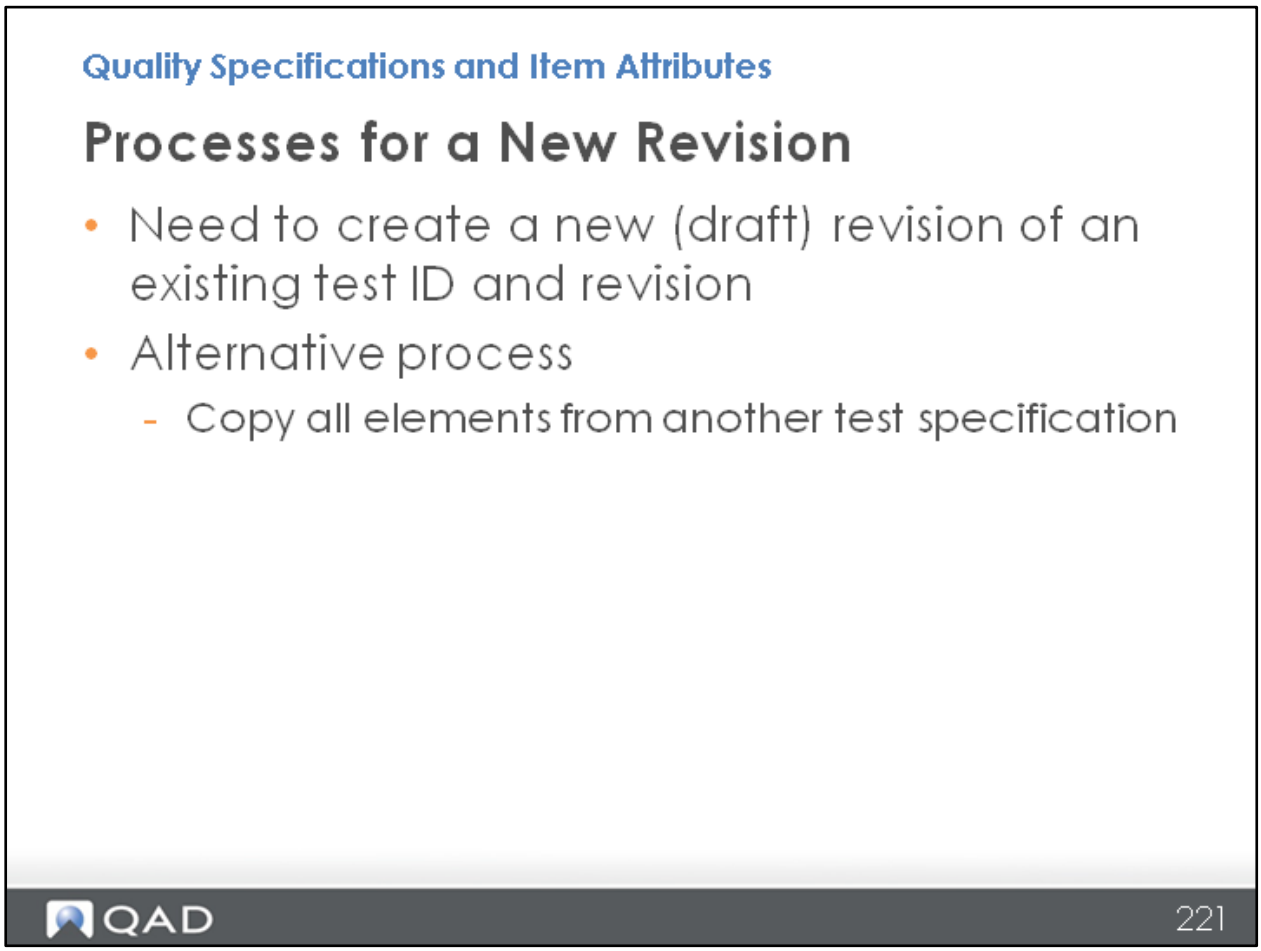
Alternative Scenarios and Processes



Alternate Scenarios for Test Specification



Processes for a New Revision

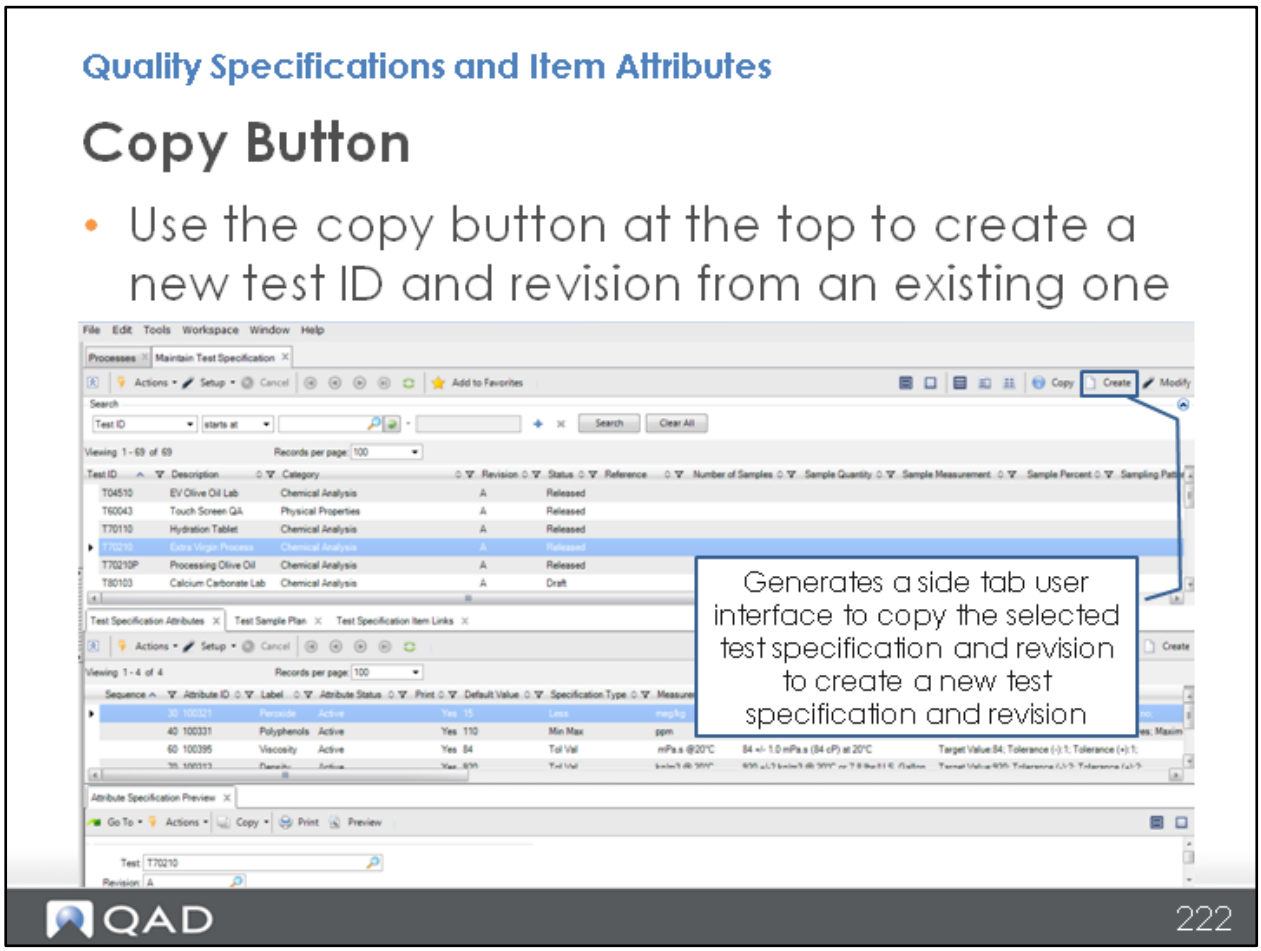


There are multiple methods for creating a test specification.

The first is to create a test specification manually. This process is similar to attribute profiles; you add attributes and conforming values.

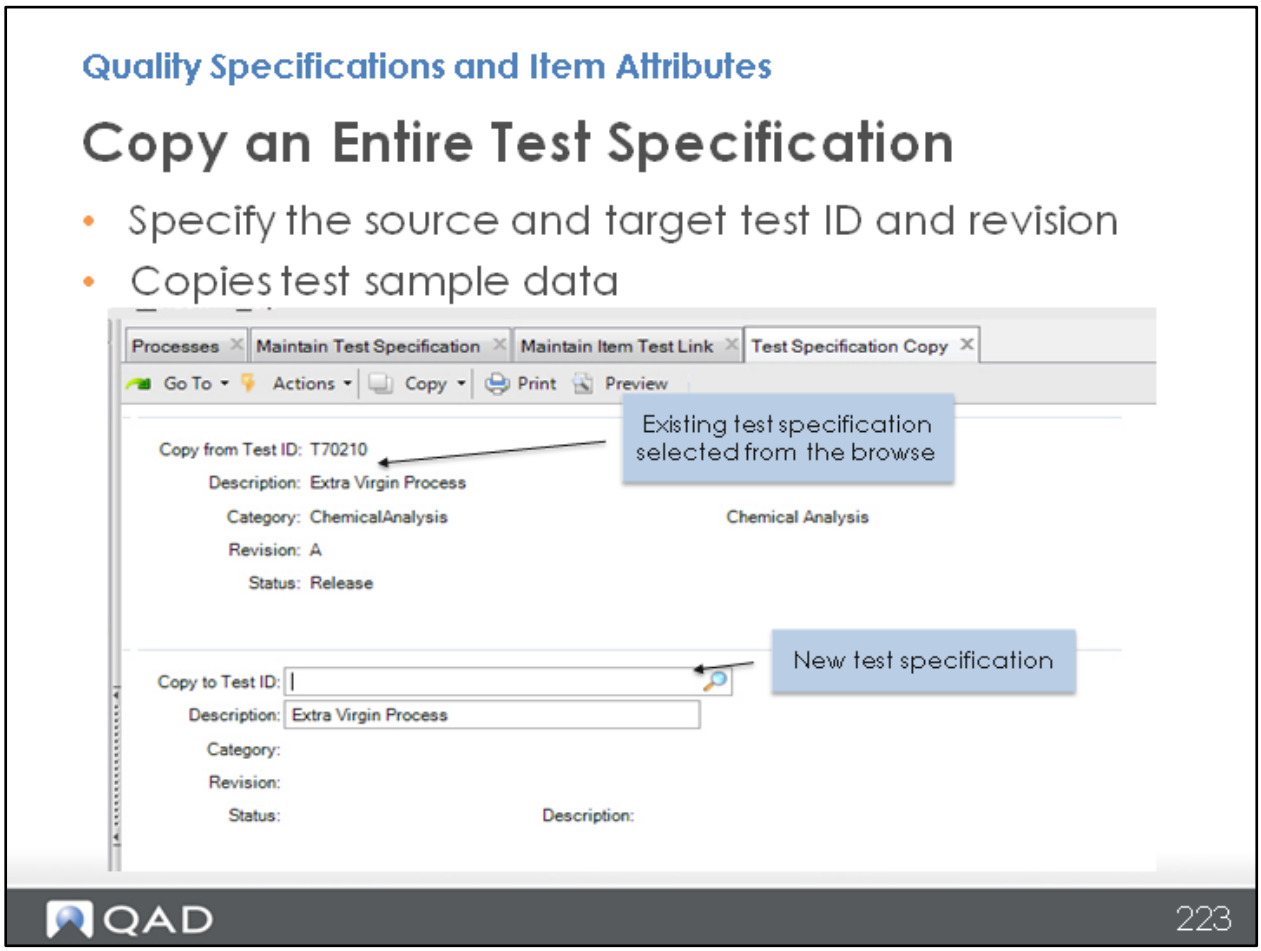
Alternately, you can copy attributes from test specifications or item profiles. In addition, you can copy all other elements from other test specifications as well.

Copy Button



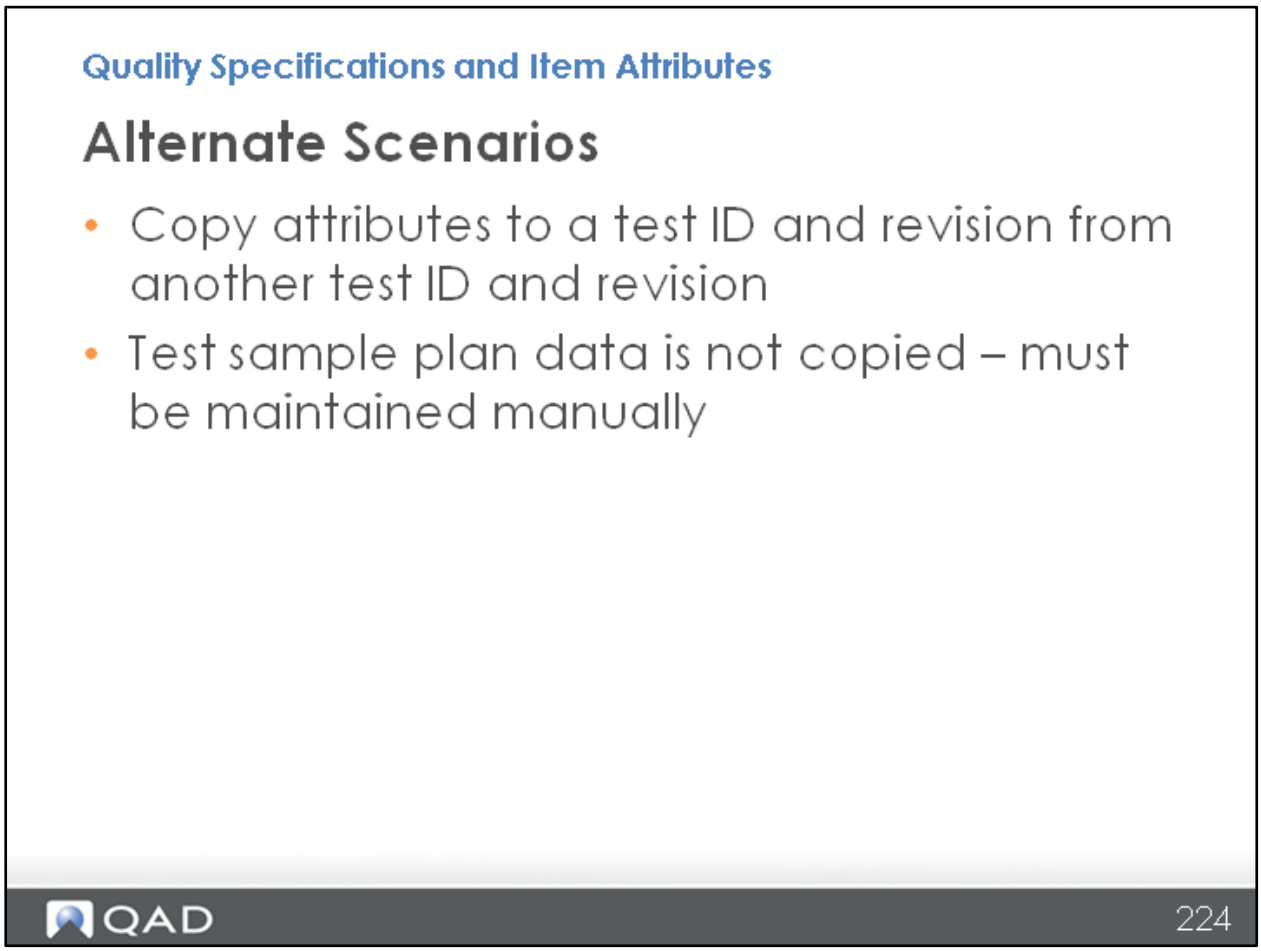
Alternately, you can copy specifications using the Copy button. This opens a frame which copies the attributes of the test specification. This is a useful feature when creating new revisions of a test specification.

Copy an Entire Test Specification

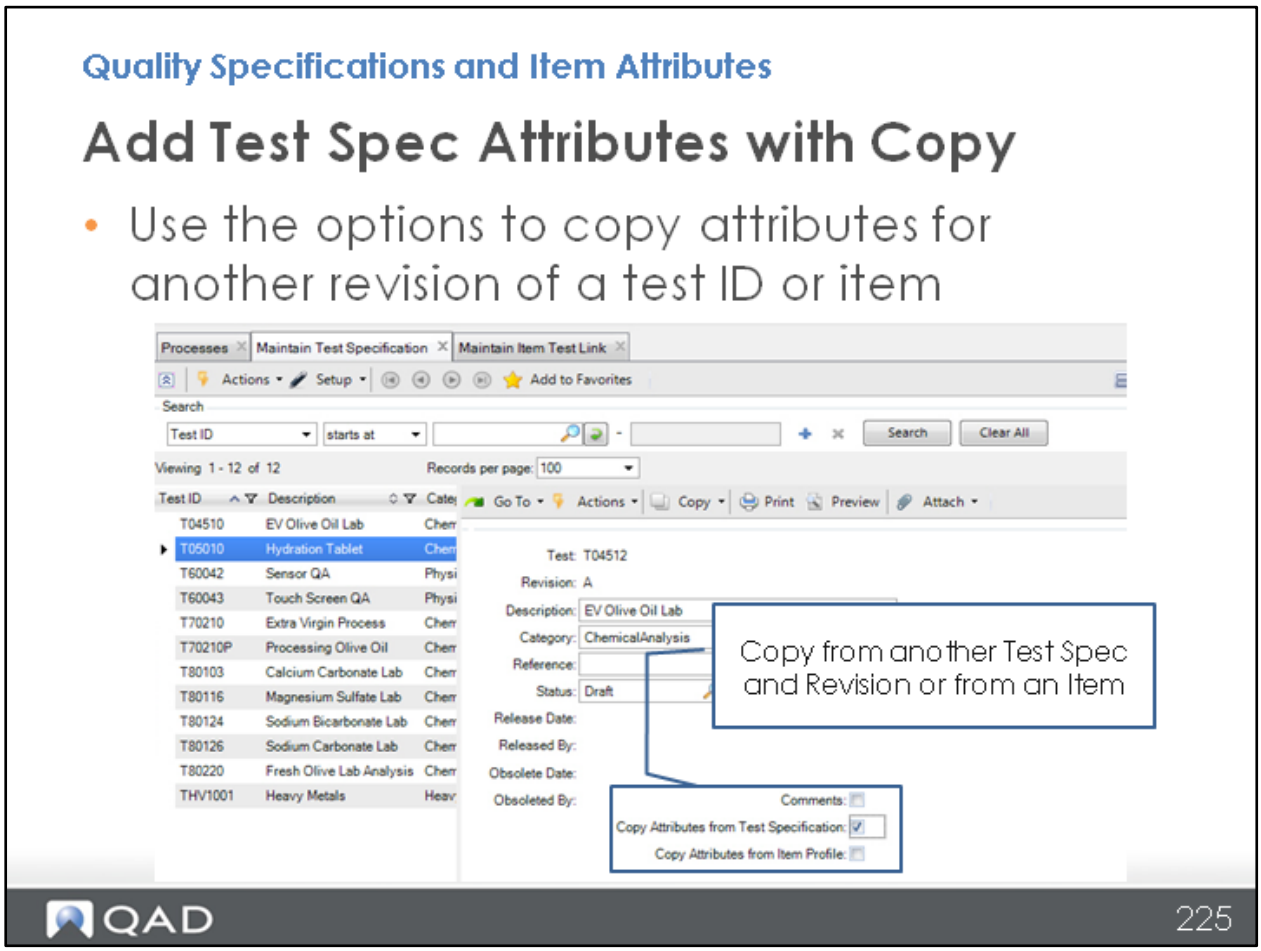


The above graphic demonstrates a copied test specification. As you can see, existing data from the test specification selected for the copy is displayed. You can then enter values that specify the Test ID that receives these values.

Alternate Scenarios



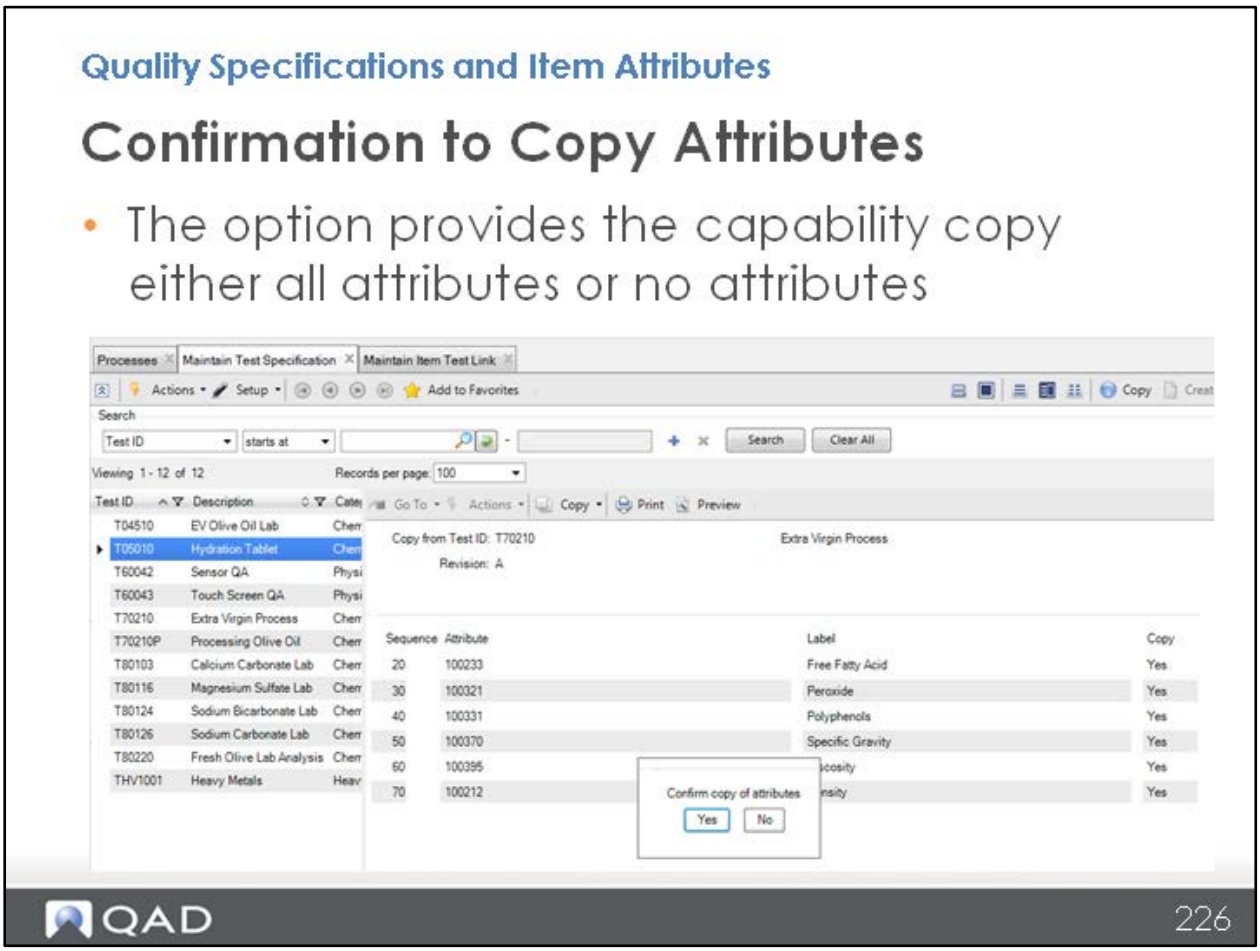
Add Test Spec Attributes with Copy



When creating test specifications, you can copy attributes from other test specifications or revisions. This can ensure greater accuracy as well as save time.

To do so, select one or more of the copy options when creating a test specification. The new test specification will have all attriutes from the selected options.

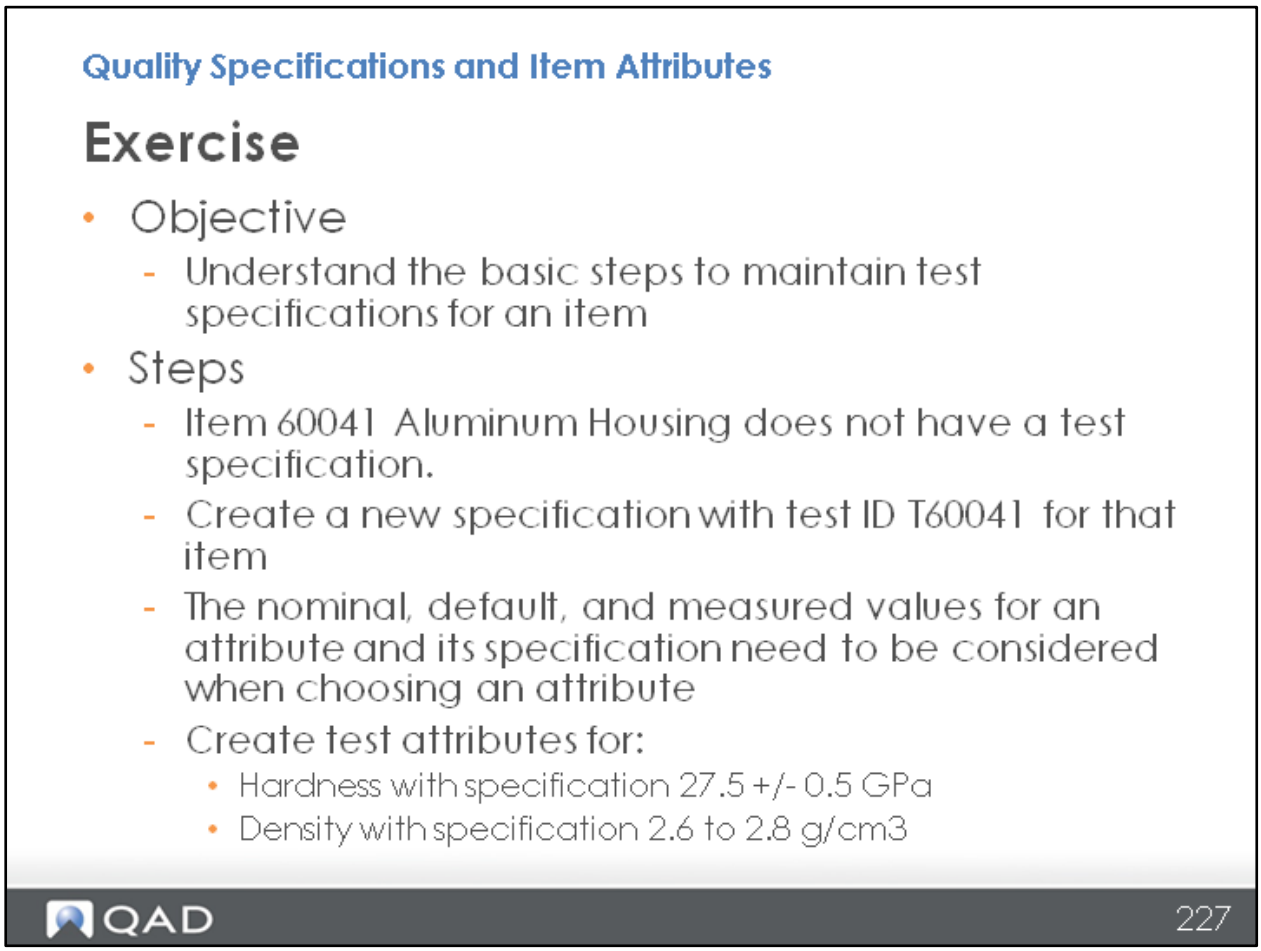
Confirmation to Copy Attributes



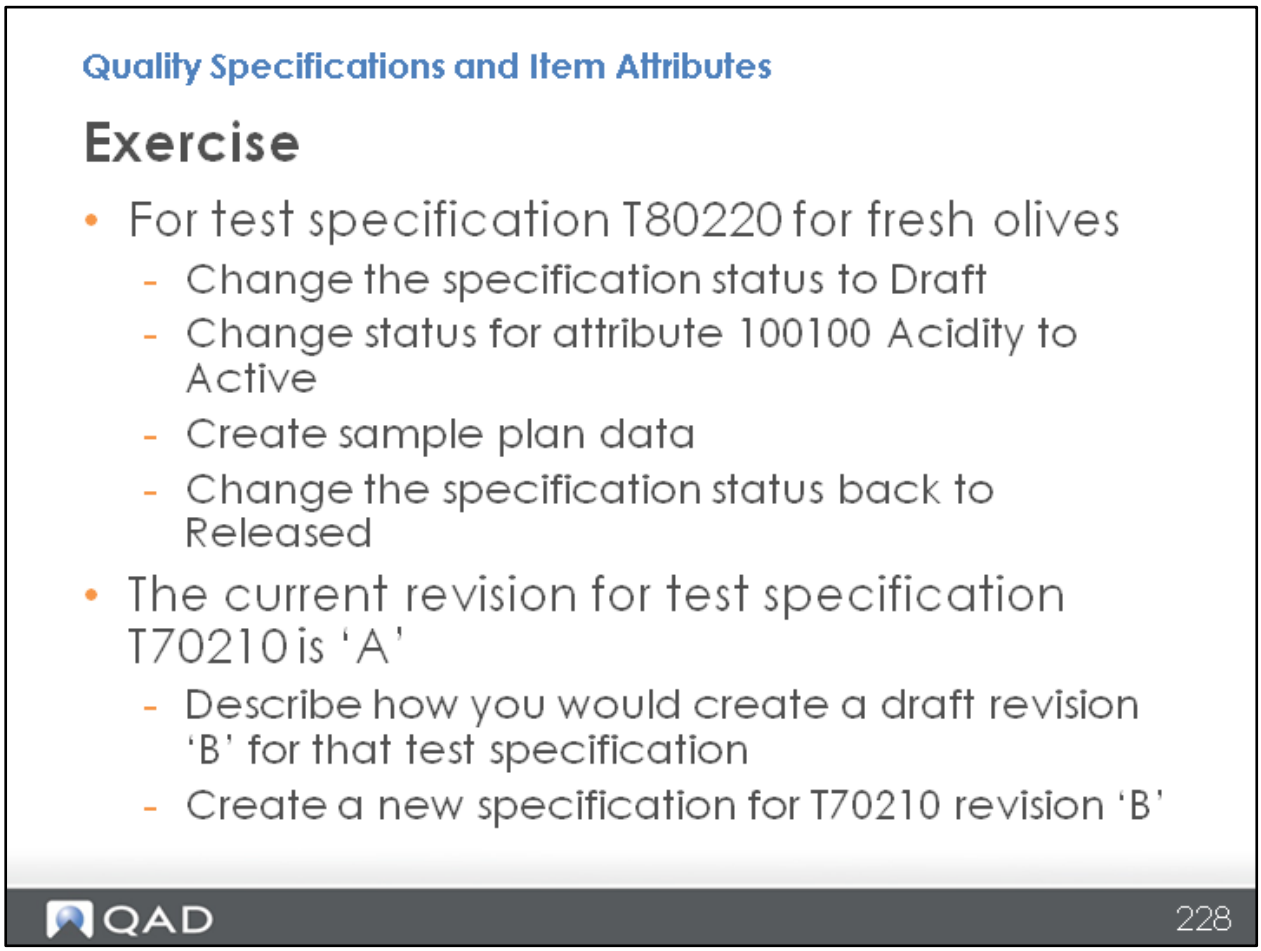
When copying attributes, the system displays all attributes to be copied.

Verify that they are correct, and click Yes to confirm.

Exercise

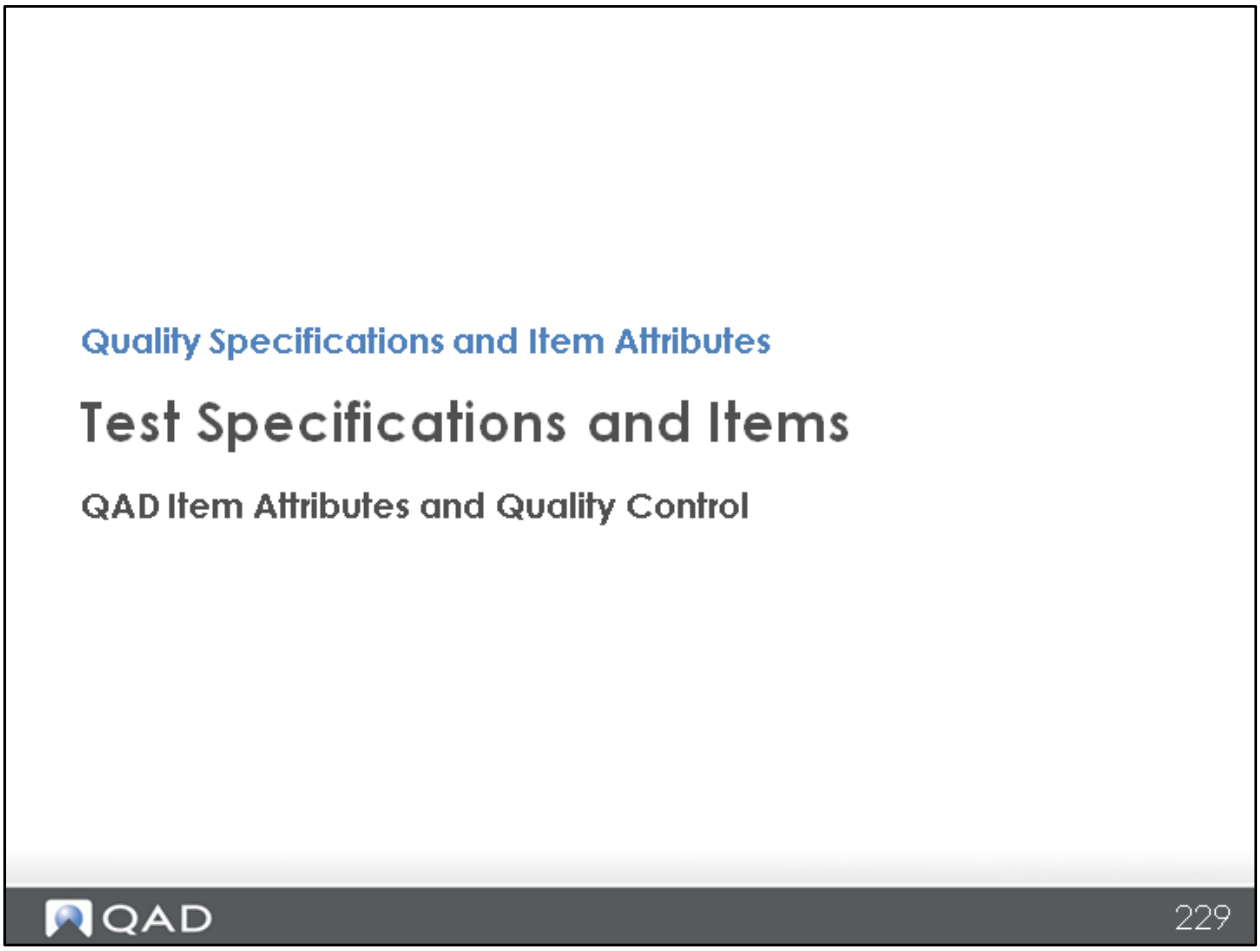

Quality Specifications and Item Attributes
Exercise
Objective
Understand the basic steps to maintain test specifications for an item
Steps
Item 60041 Aluminum Housing does not have a test specification.
Create a new specification with test ID T60041 for that item
The nominal, default, and measured values for an attribute and its specification need to be considered when choosing an attribute
Create test attributes for:
Hardness with specification 27.5 +/- 0.5 GPa
Density with specification 2.6 to 2.8 g/cm3
QAD
227

Exercise

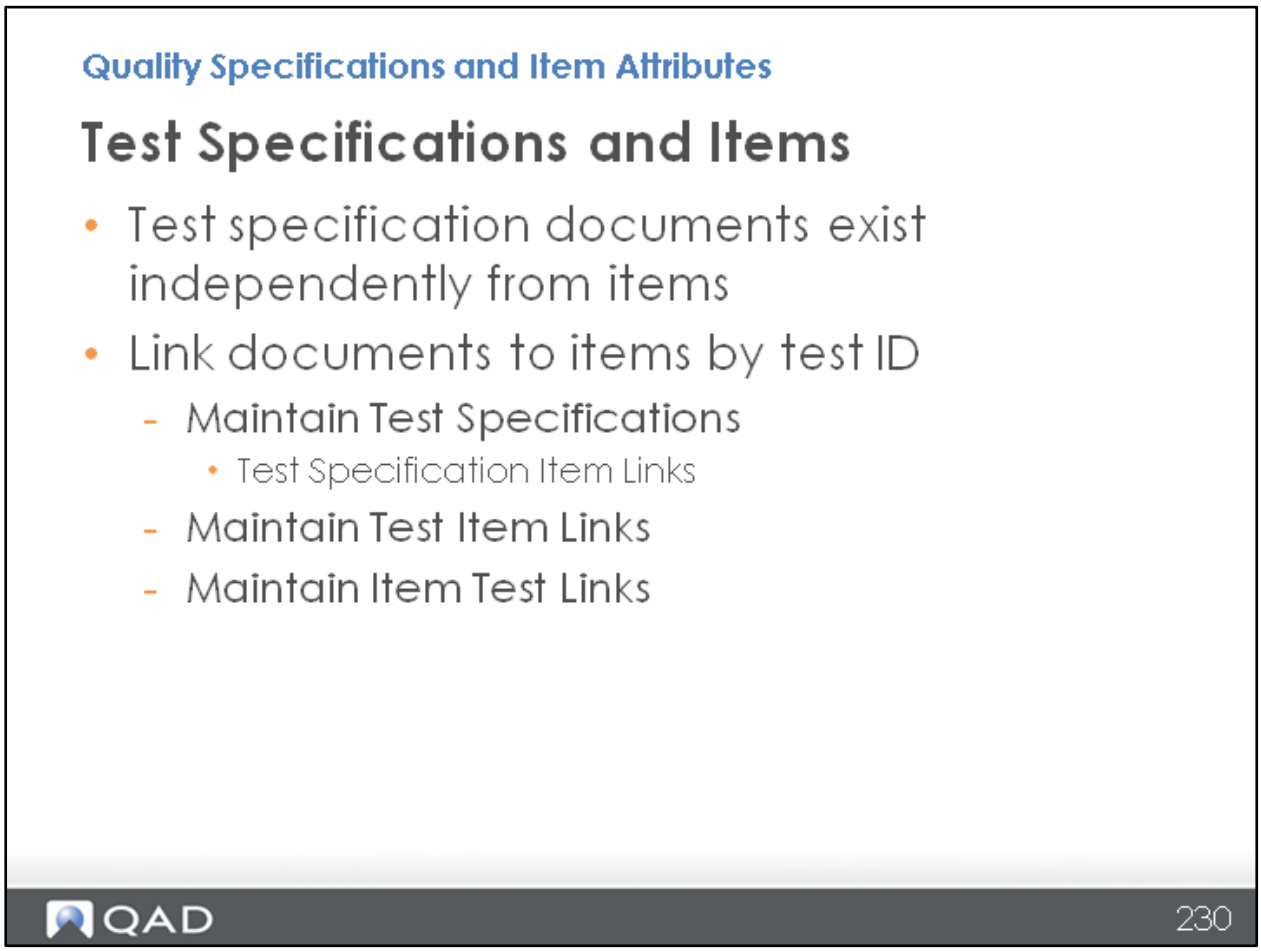


Note: The nominal, default, and measured values for an attribute and the specification for an attribute need to be considered when choosing an attribute with an appropriate datatype and format.

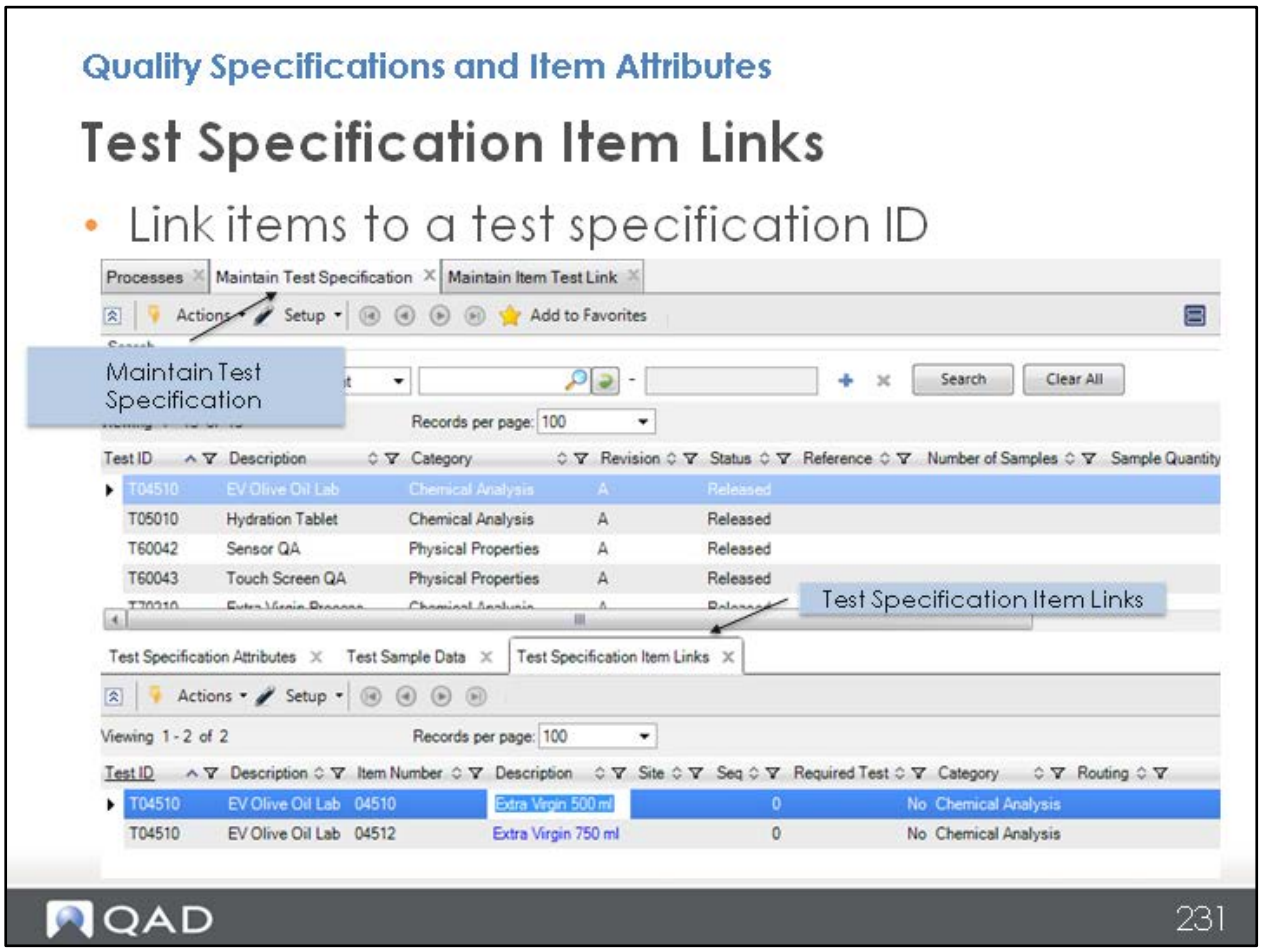
Test Specifications and Items



Test Specifications and Items

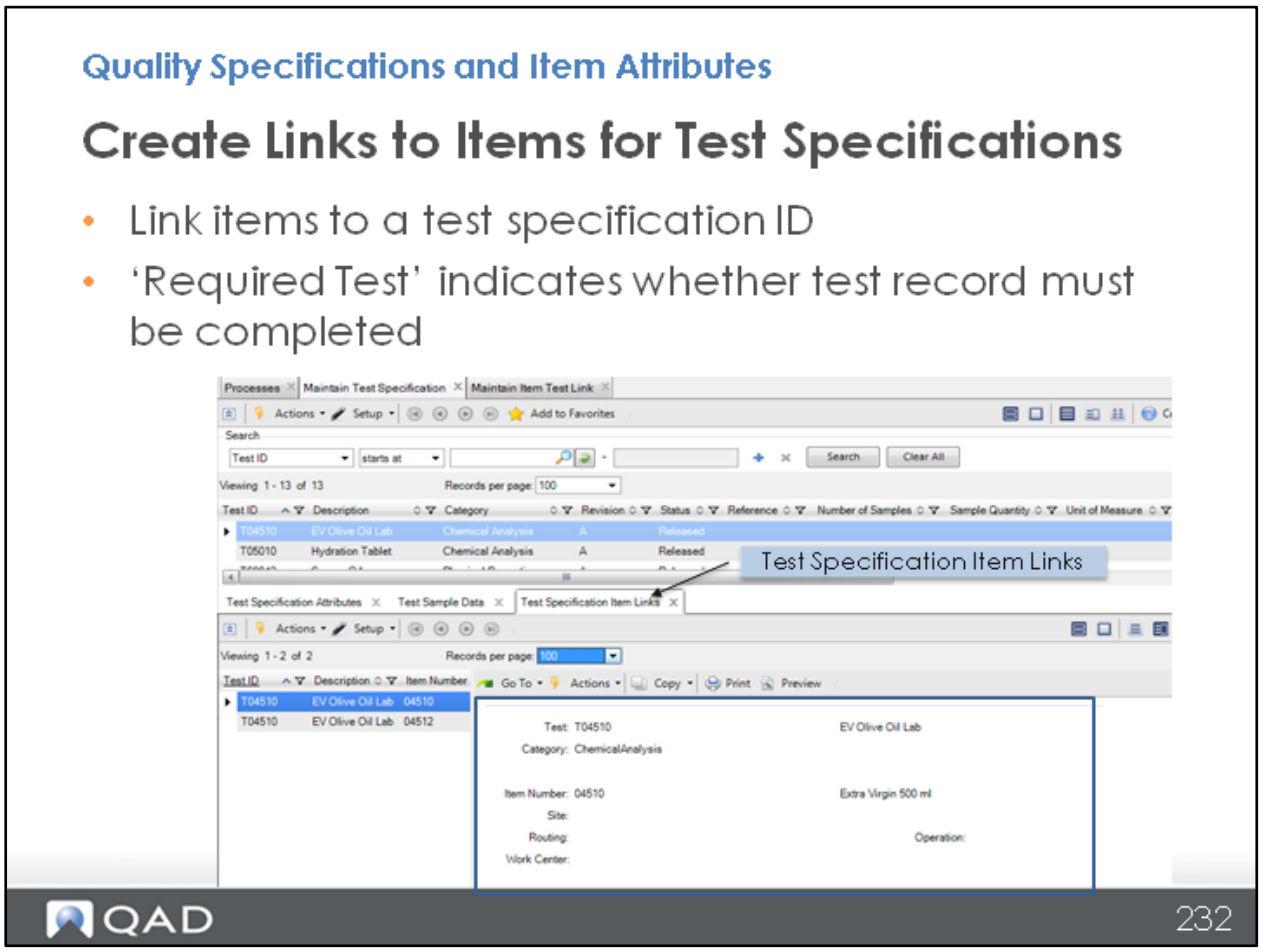


Test Specification Item Links



Once created, you must link test specifications to items. This determines which items are tested and which item lots gain attributes from specifications.

Create Links to Items for Test Specifications



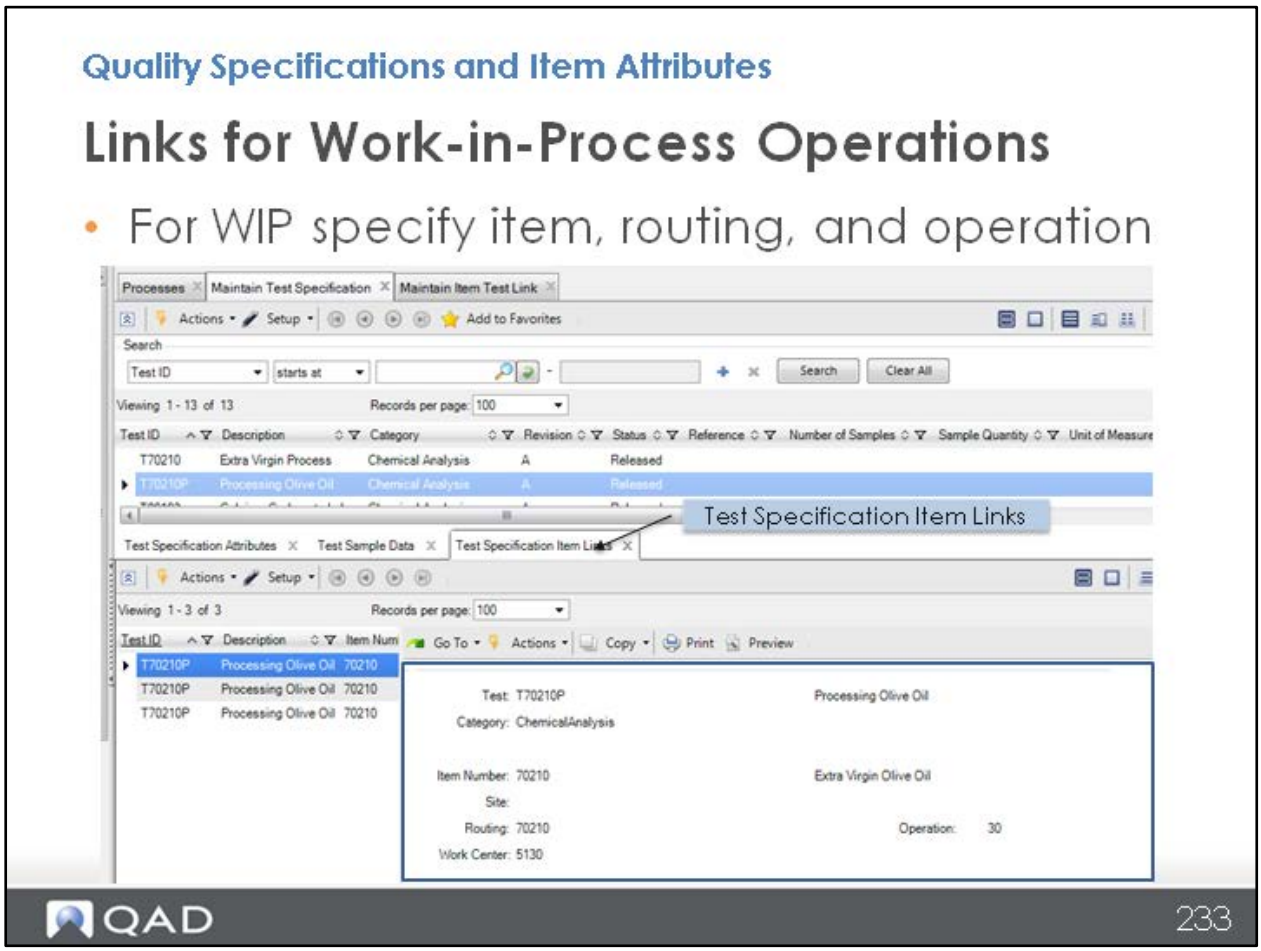
To link a test specification to an item, click the Create button in the Test Specification Item Links tab.

Enter the Item Number that you wish to link to the test specification. If you specify a Site, then only items at the chosen site link to the test specification.

The Sequence option determines in which order test specifications appear on an attribute.

The Required Test option determines whether the test is mandatory.

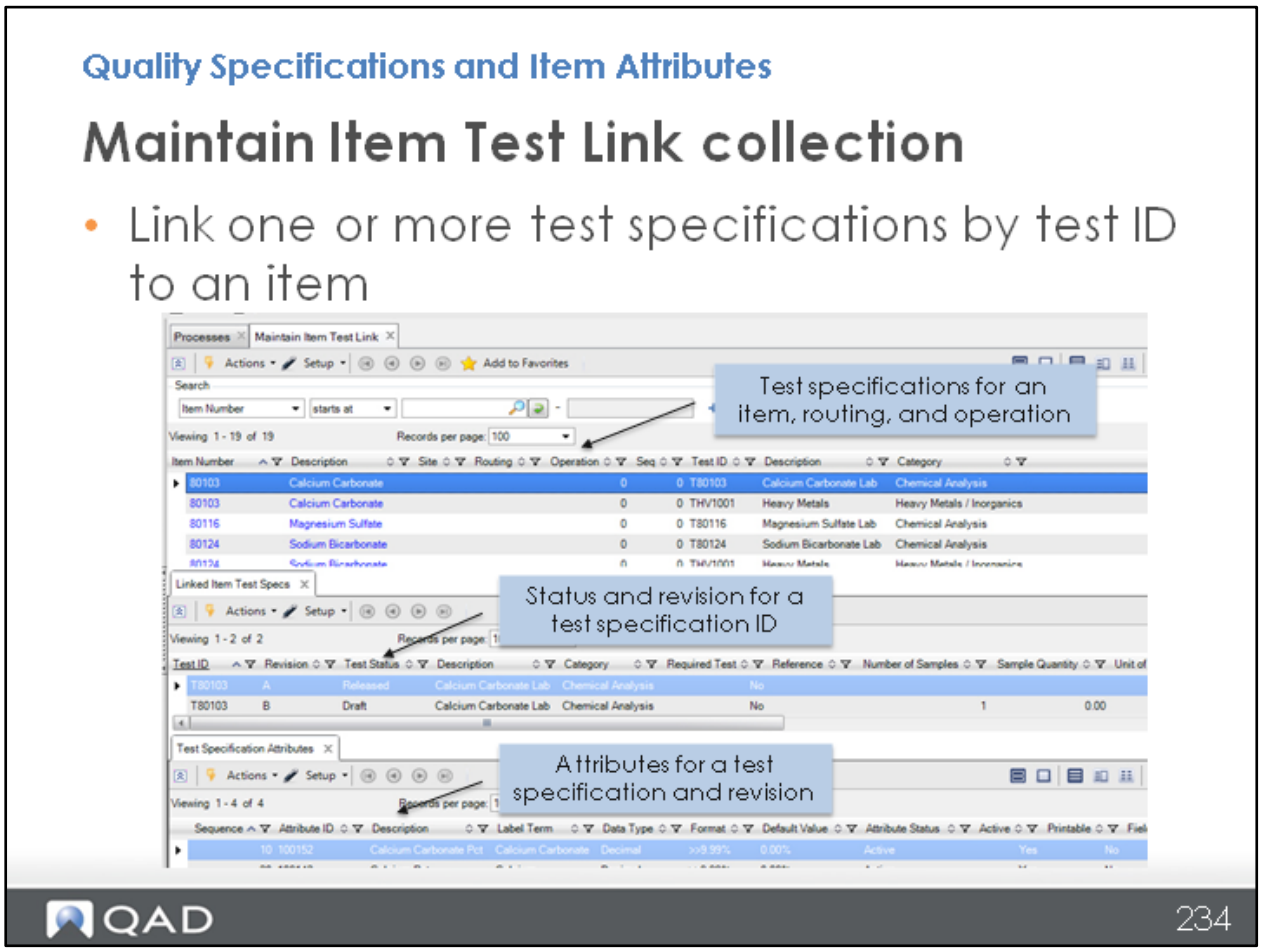
Links for Work-in-Process Operations



In addition to a site, you can choose to link a test to a specific work-in-process operation.

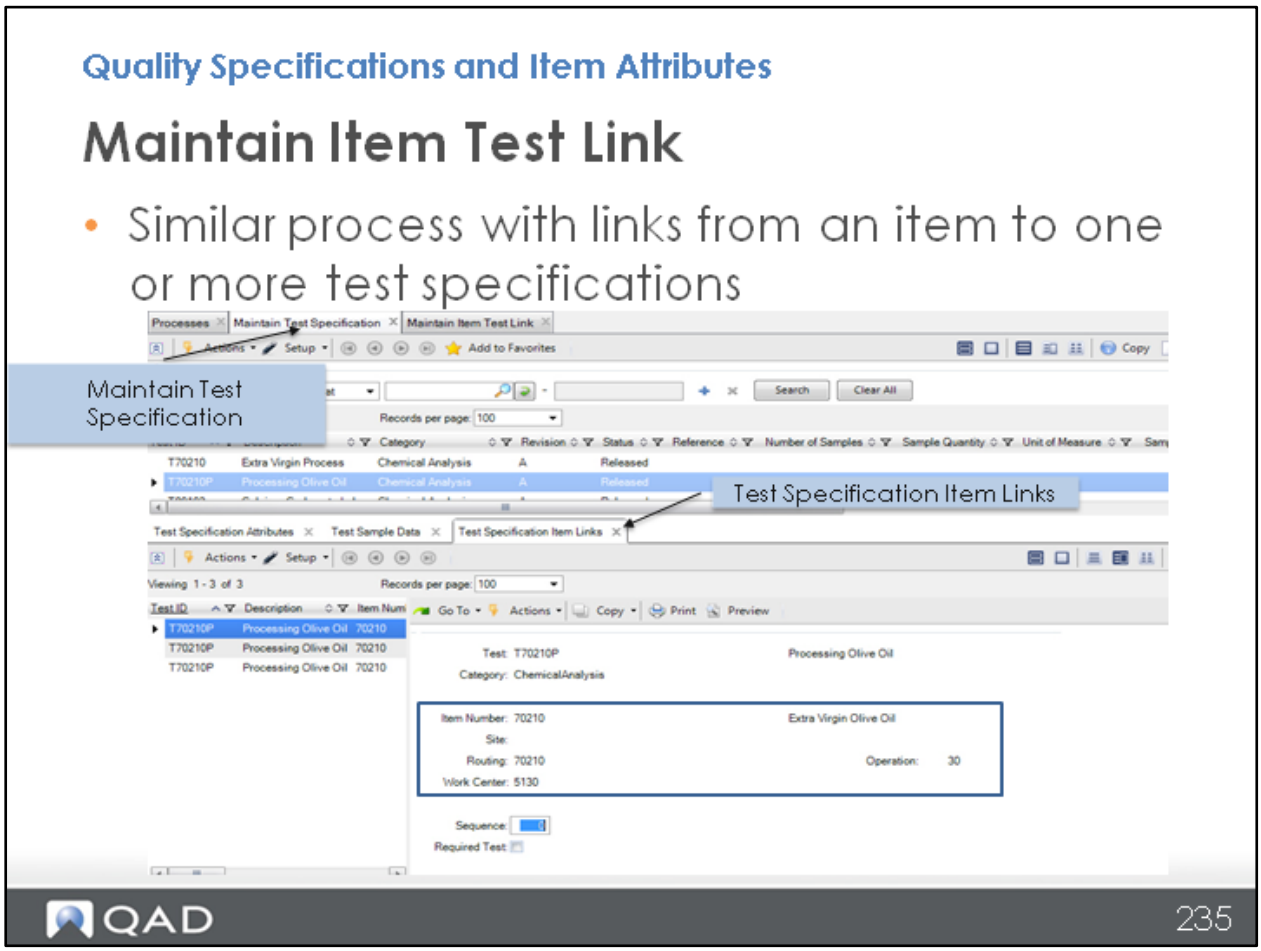
To do so, specify a Routing and Operation. If you do, the test specification triggers only when those conditions are met.

Maintain Item Test Link collection



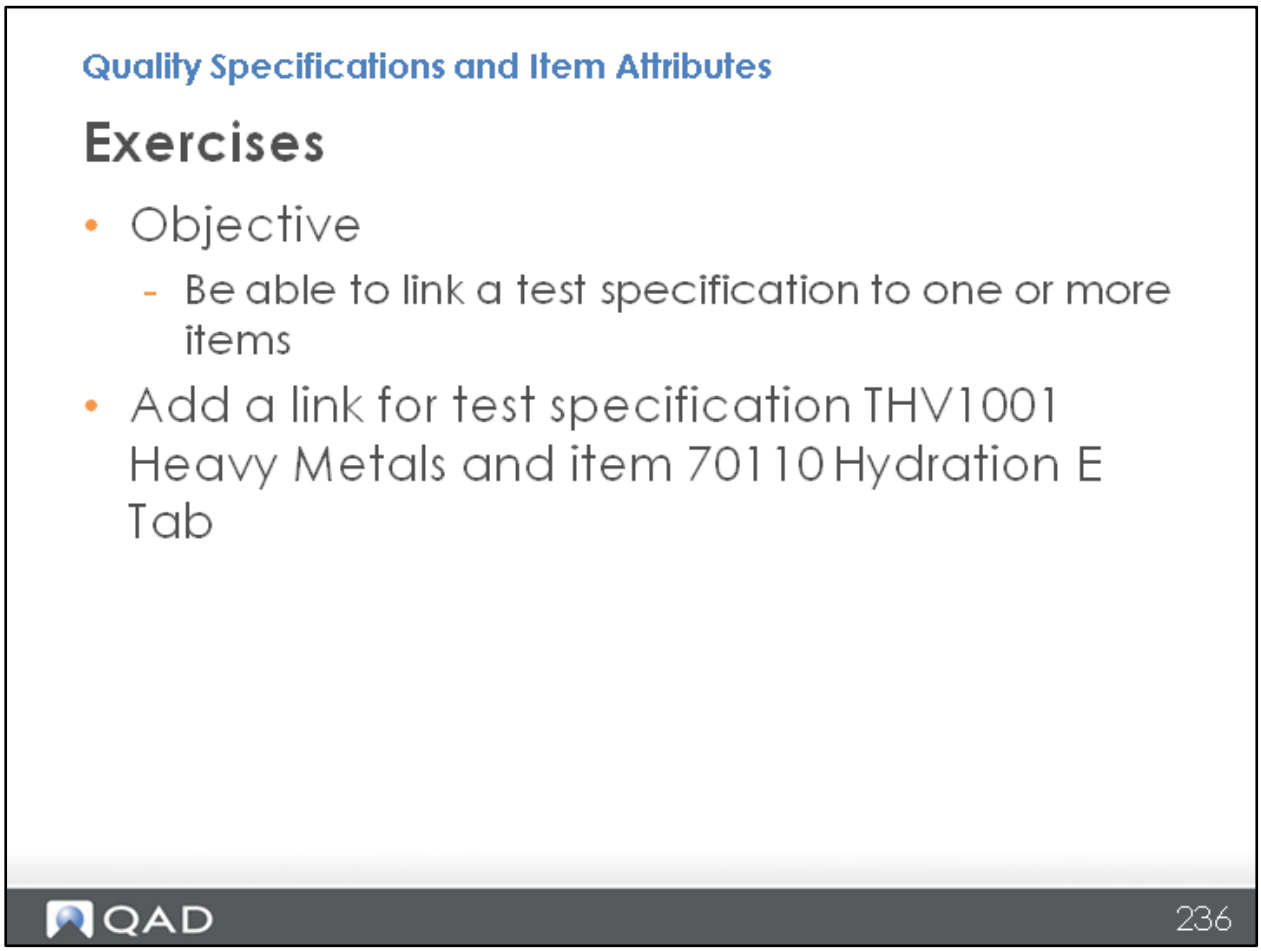
You can use the Maintain Item Test Link browse collection to view all the test links, sorted by item. From this browse collection, you can easily edit all relevant test specifications for a certain item.

Maintain Item Test Link



When specifying a test for a work in process operation, you need to specify the routing and operation for that test.

Exercises


Quality Specifications and Item Attributes
Exercises
Objective
Be able to link a test specification to one or more items
Add a link for test specification THV1001 Heavy Metals and item 70110 Hydration E Tab
QAD
236

Quality Control and Inventory

Lesson Objectives

This section of training covers several common scenarios for quality control. These scenarios utilize the test specifications that you learned to create in the last session to create and utilize quality orders.

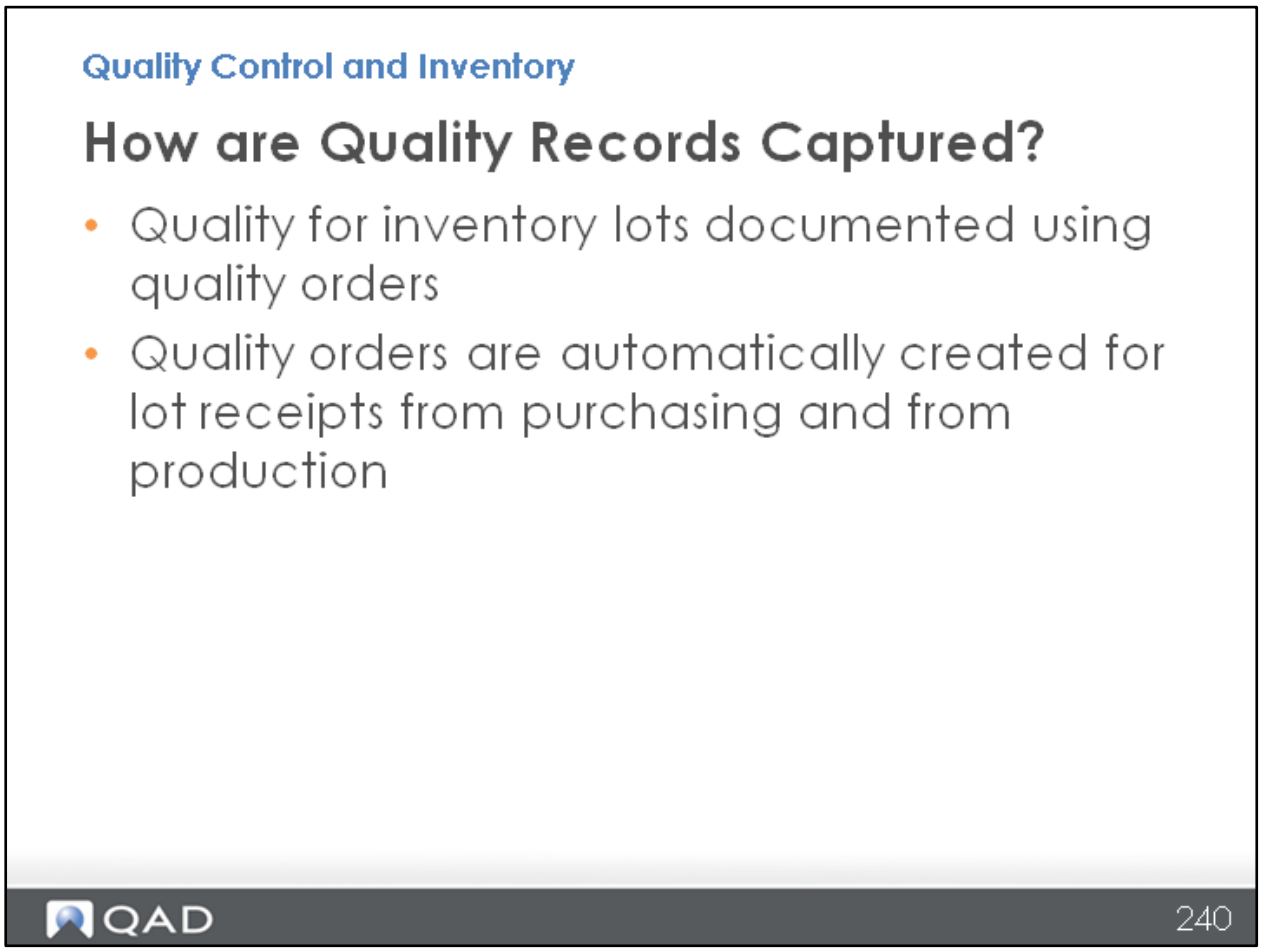
First, you will cover how the workflow for inspecting lots after receipt. This basic scenario provides an introduction to the higher level concepts of quality control.

Next, you will cover how to re-inspect inventory lots already within inventory. This scenario covers the manual creation of quality orders.

Finally, you will cover how to adjust quality orders to meet the specifications of a customer or sales order before shipment. This scenario demonstrates how you can customize a quality order to meet the unique requirements of a customer.

Introduction to Quality Records

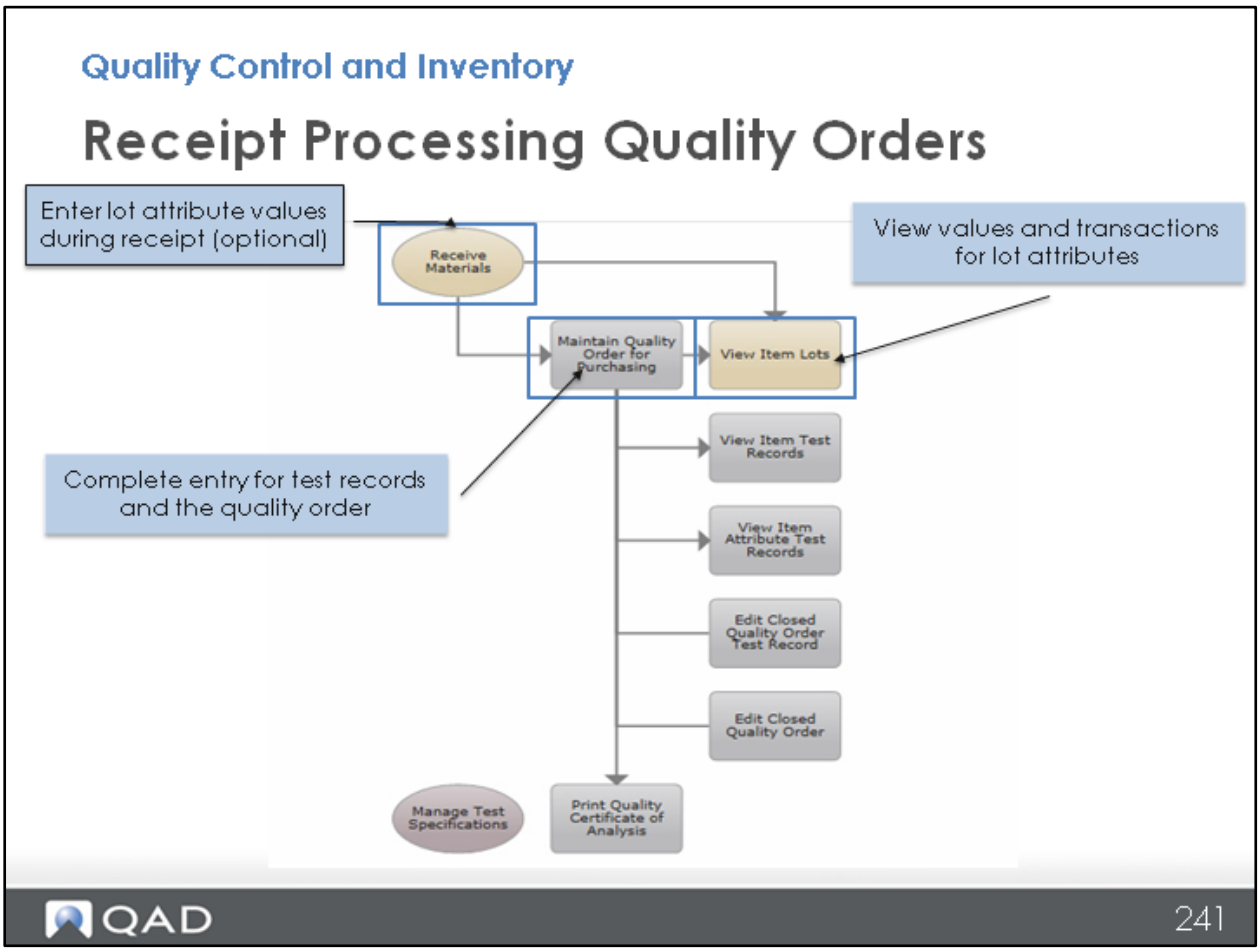
How are Quality Records Captured?



Quality orders direct the creation of quality records.

Each contains a number of test records, which contain the results for a test specification.
There are multiple instances for the creation of quality orders. First, this guide presents the automatic creation of quality orders from receipts.

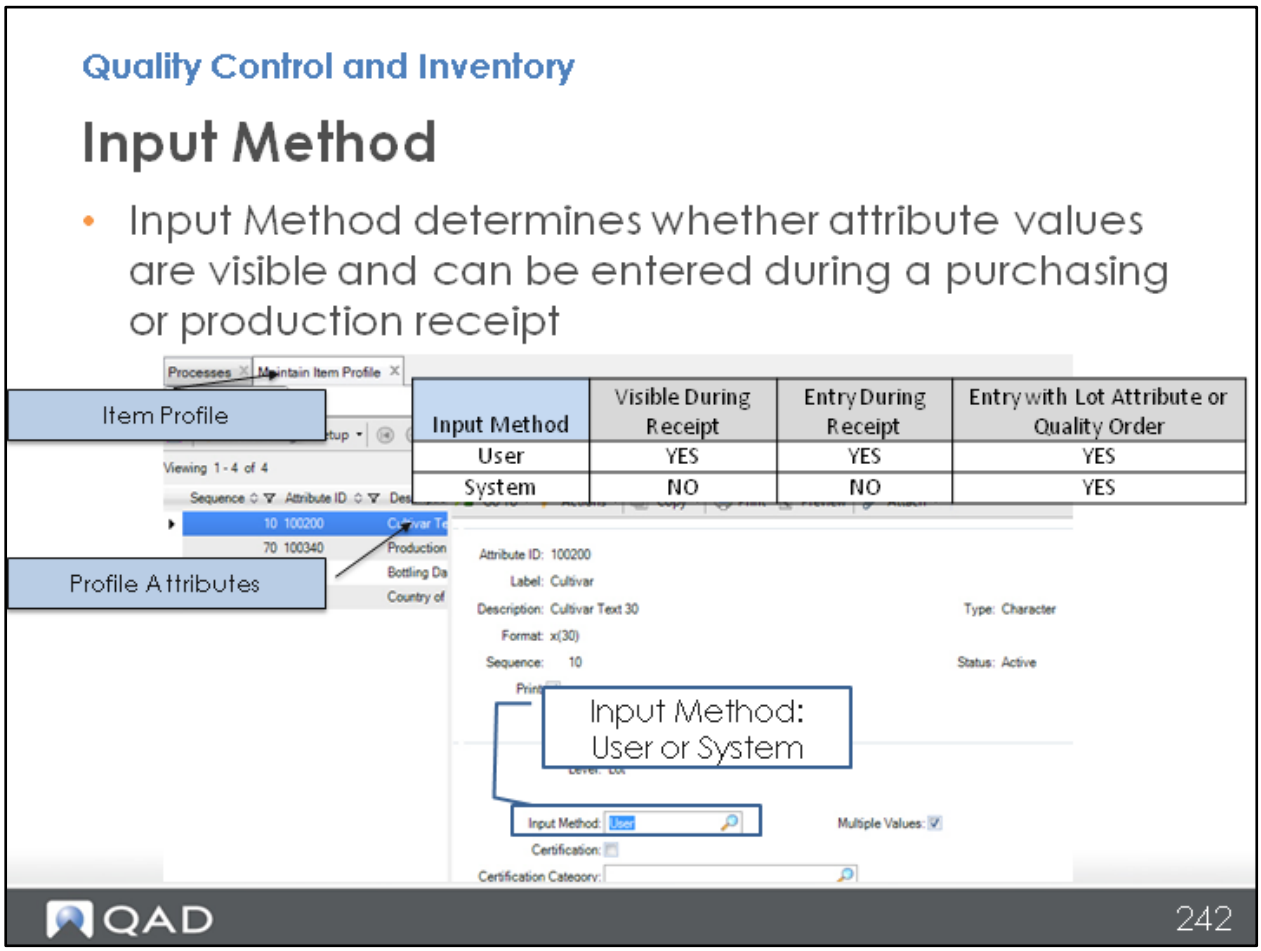
Receipt Processing Quality Orders



Manage the quality orders created through receipts here:

Home > Manage Enterprise Item Attributes > Manage Purchasing with Attributes > Inspect Purchasing Receipts

Input Method

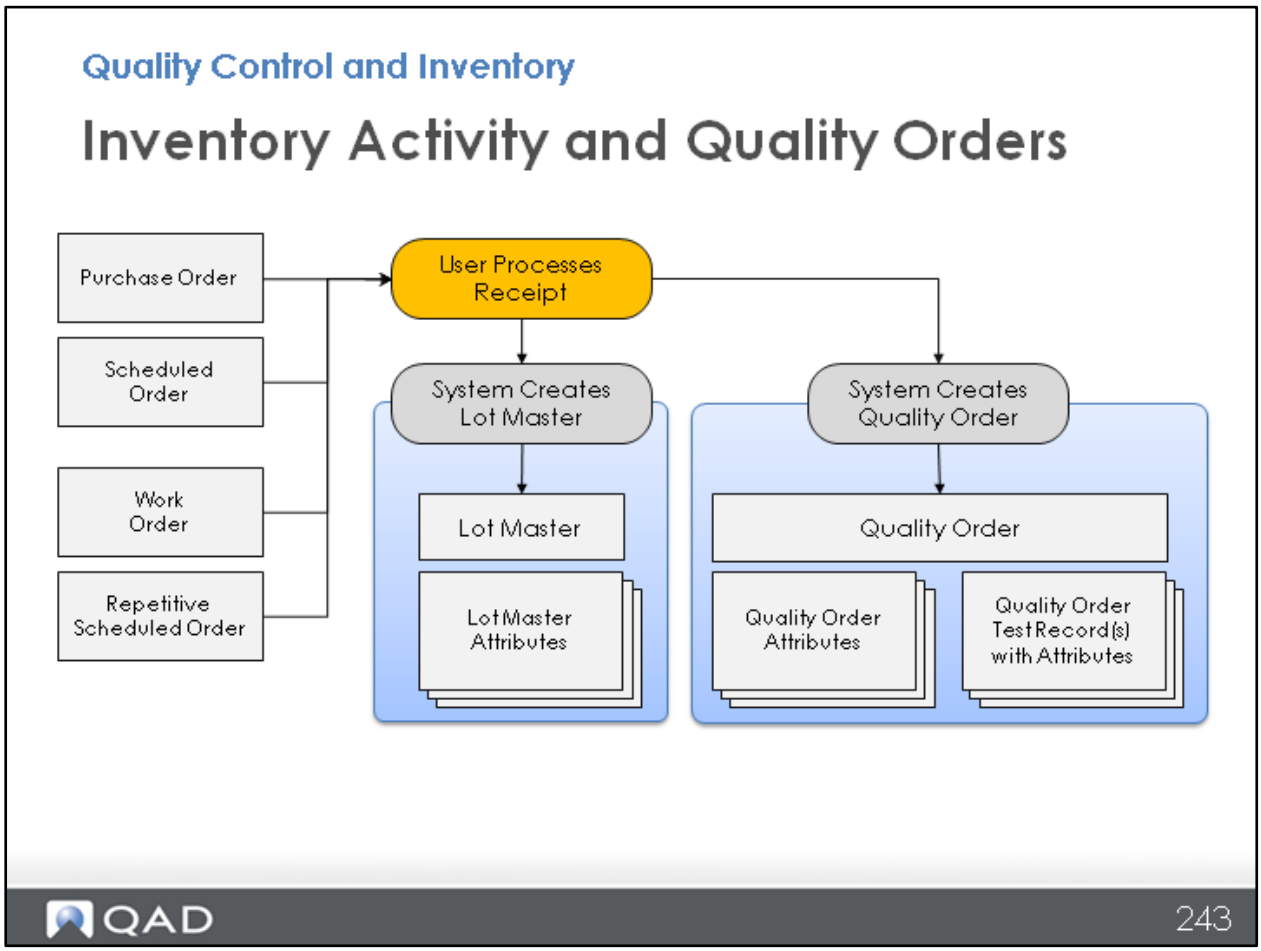


The Input Method of an attribute determines when and how users can provide it with a value.

If the input method is set to User, then you can view and enter the attributes at the time of transaction receipt. You can also enter the attributes through the lot attribute or quality order.

If the input method is set to System, then you can only enter attributes through the lot attribute or quality order.

Inventory Activity and Quality Orders



The diagram above depicts how the system processes lots and quality orders following a purchase order.

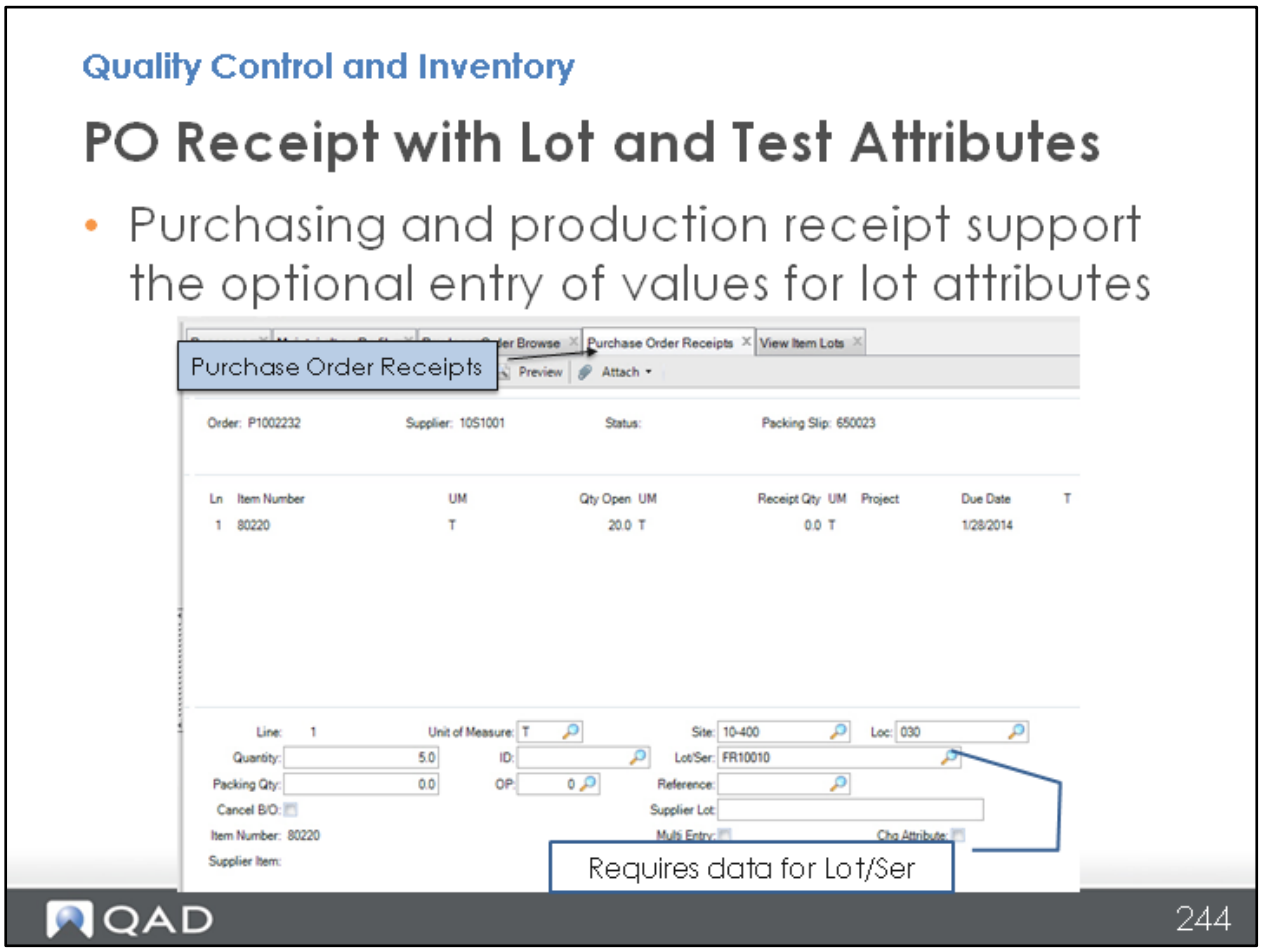
After the receipt of the purchase order, the system creates a lot master, generic to that item type, with associated lot attributes. Then, it also creates a quality order with attributes specific to a test specification.

Quality for inventory lots documented using quality orders

Contain one or more test records

Test records contain the results for a test specification and its attributes

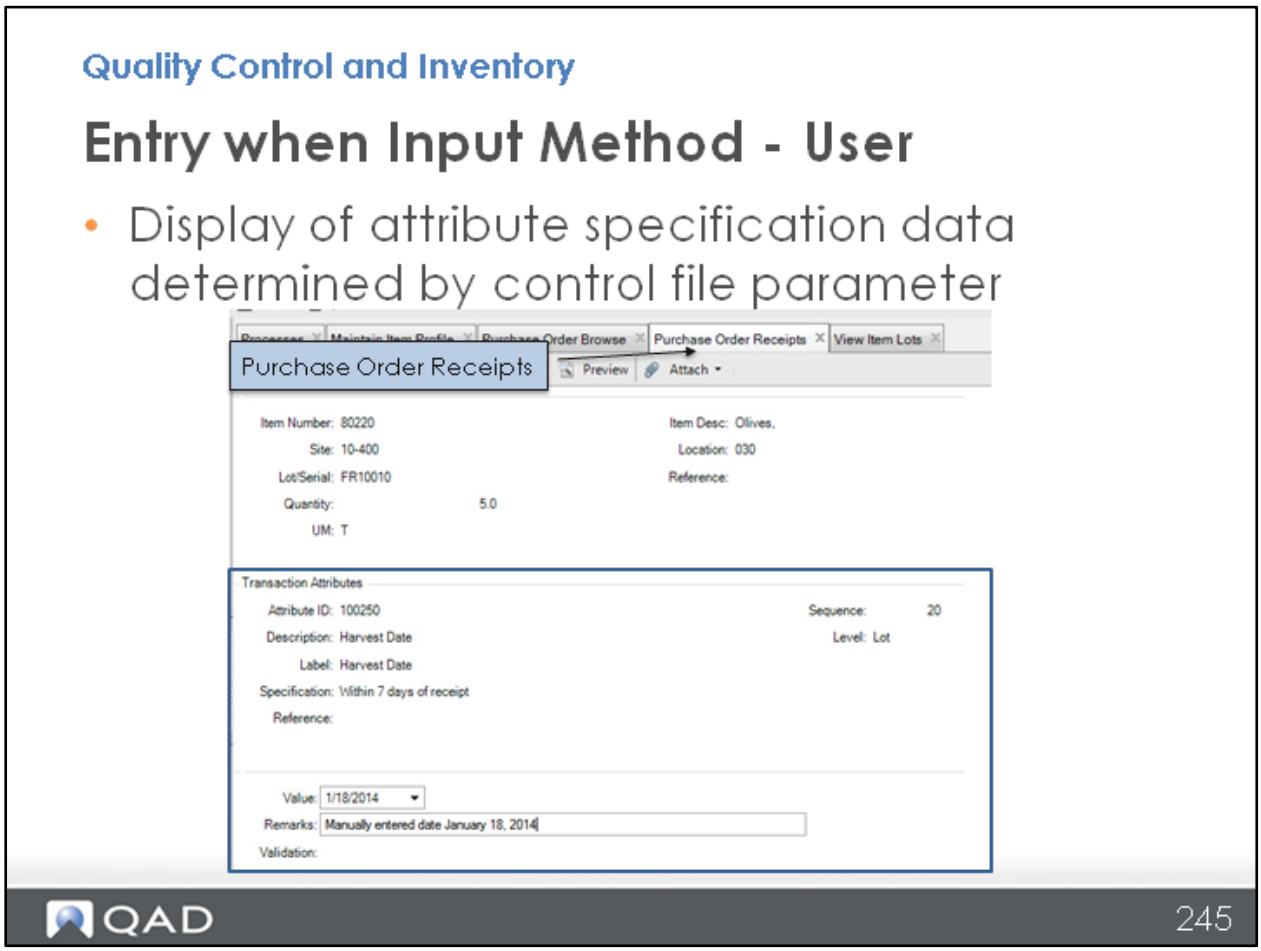
PO Receipt with Lot and Test Attributes



The quality process for a receipt begins with the receipt of an item with an attached test specification.

The above image depicts the receipt of fresh olives, an item with an attached specification.

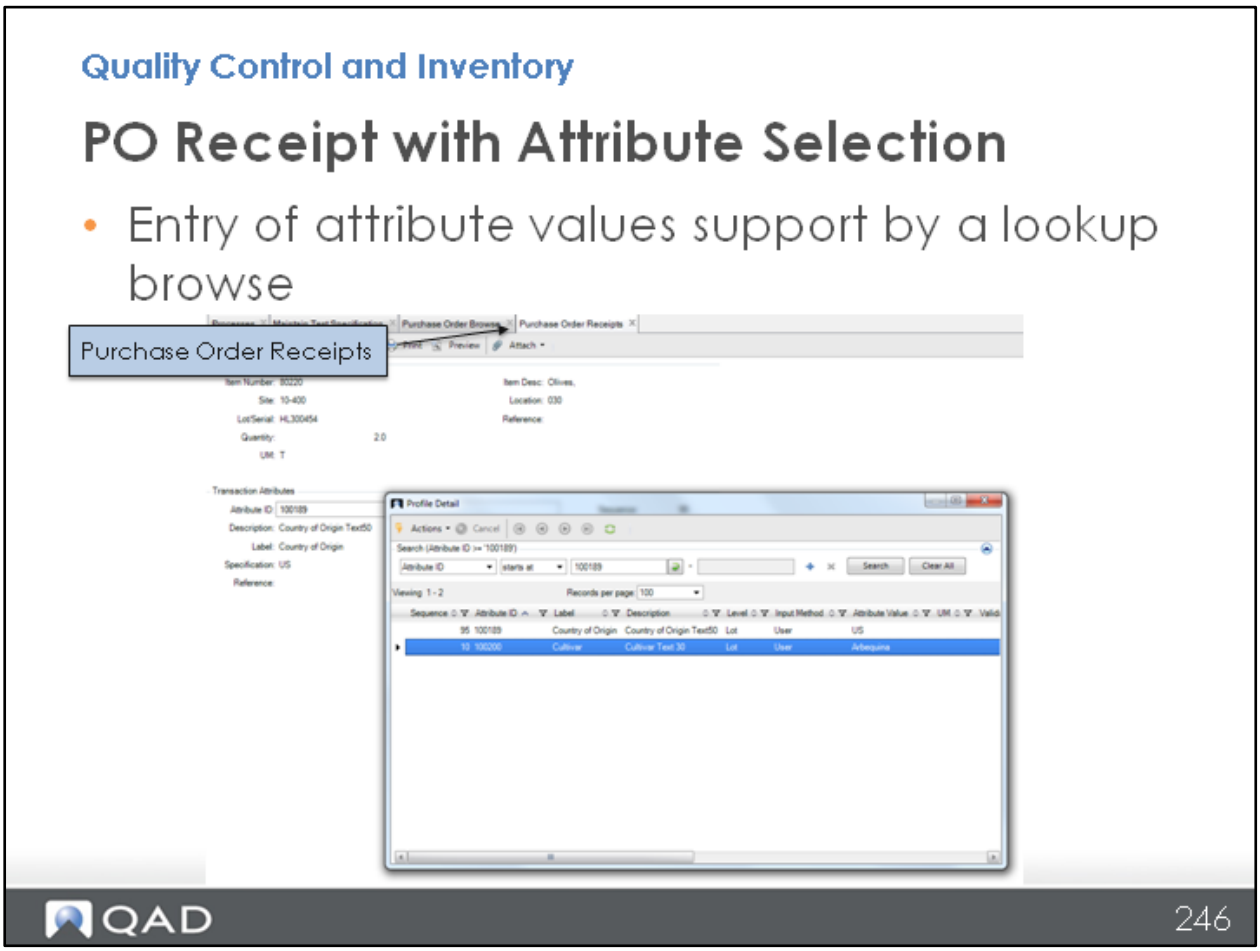
Entry when Input Method - User



Enter Value and other fields for the attribute. Then click Next to save the information. After entering all attributes you intend to enter, click Back to finish saving the purchase order.

Note: Although you can not edit attributes with an Input Method of System at this time, you can open them and select them and click next to accept their default value. This changes the attribute to Entered and counts as having given a value, even if the default value for that attribute is blank.

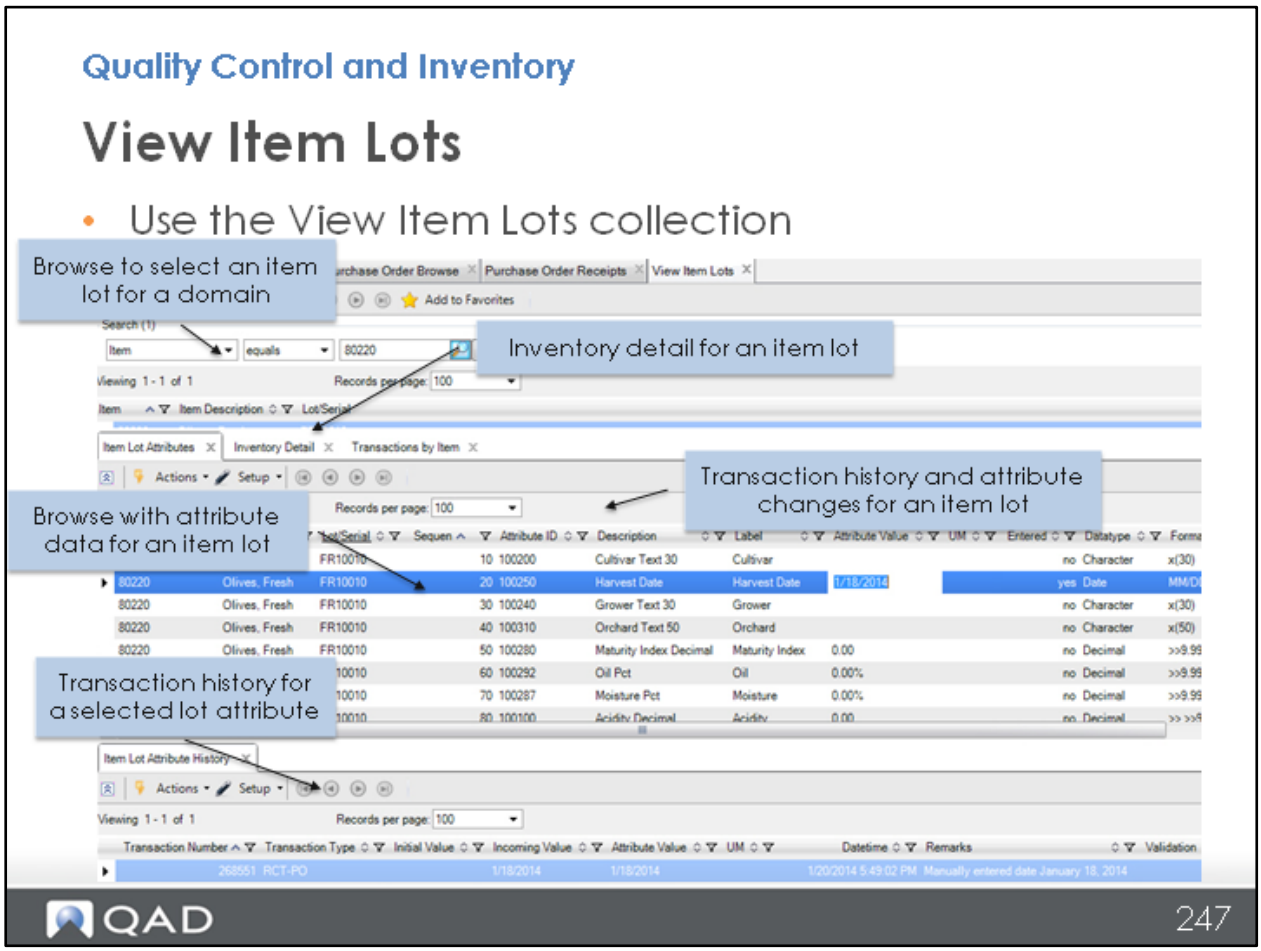
PO Receipt with Attribute Selection



The system provides you an option to view attributes with input method of User.

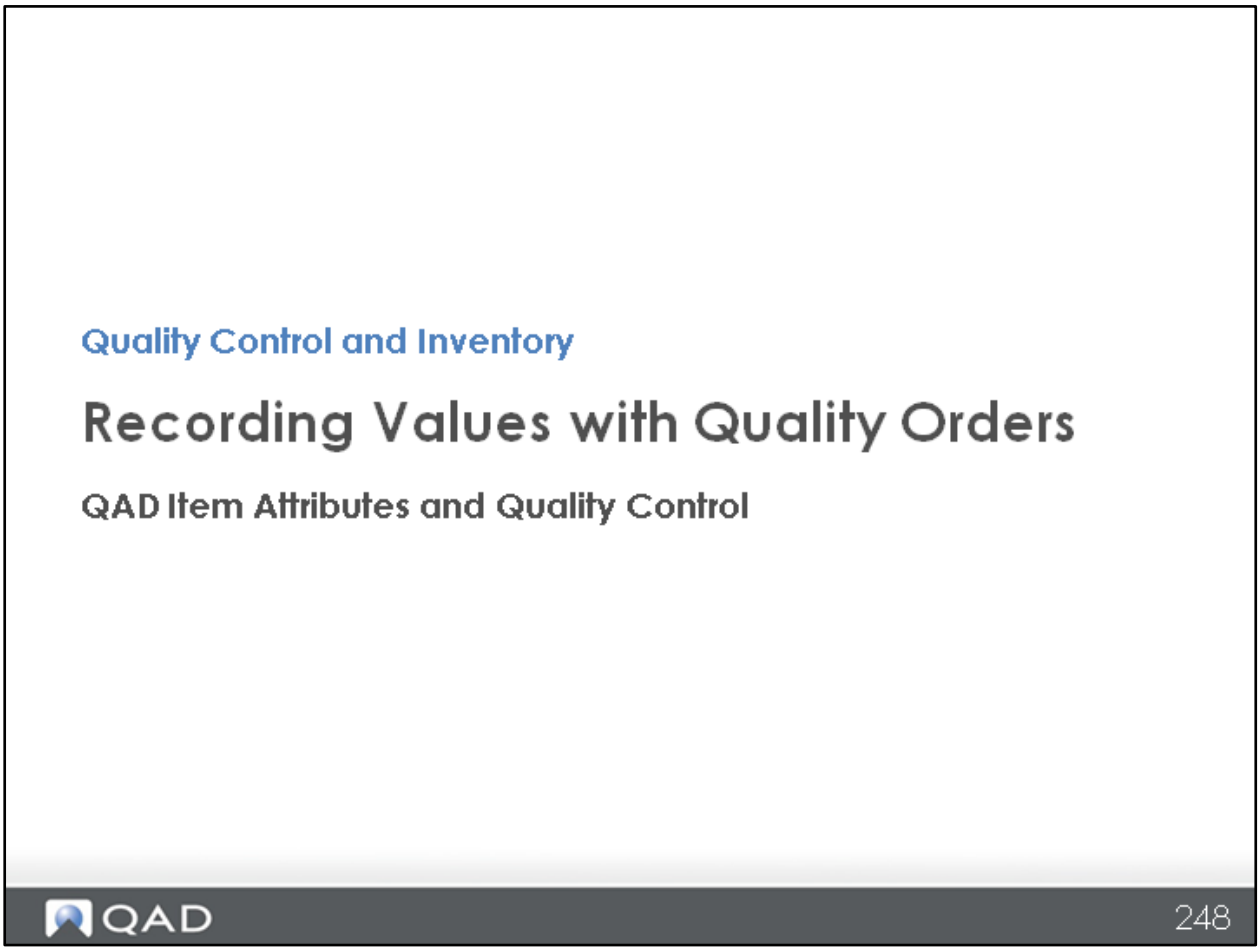
This detailed view of the Olives, Fresh item displays lot level attributes with input method of User.

View Item Lots

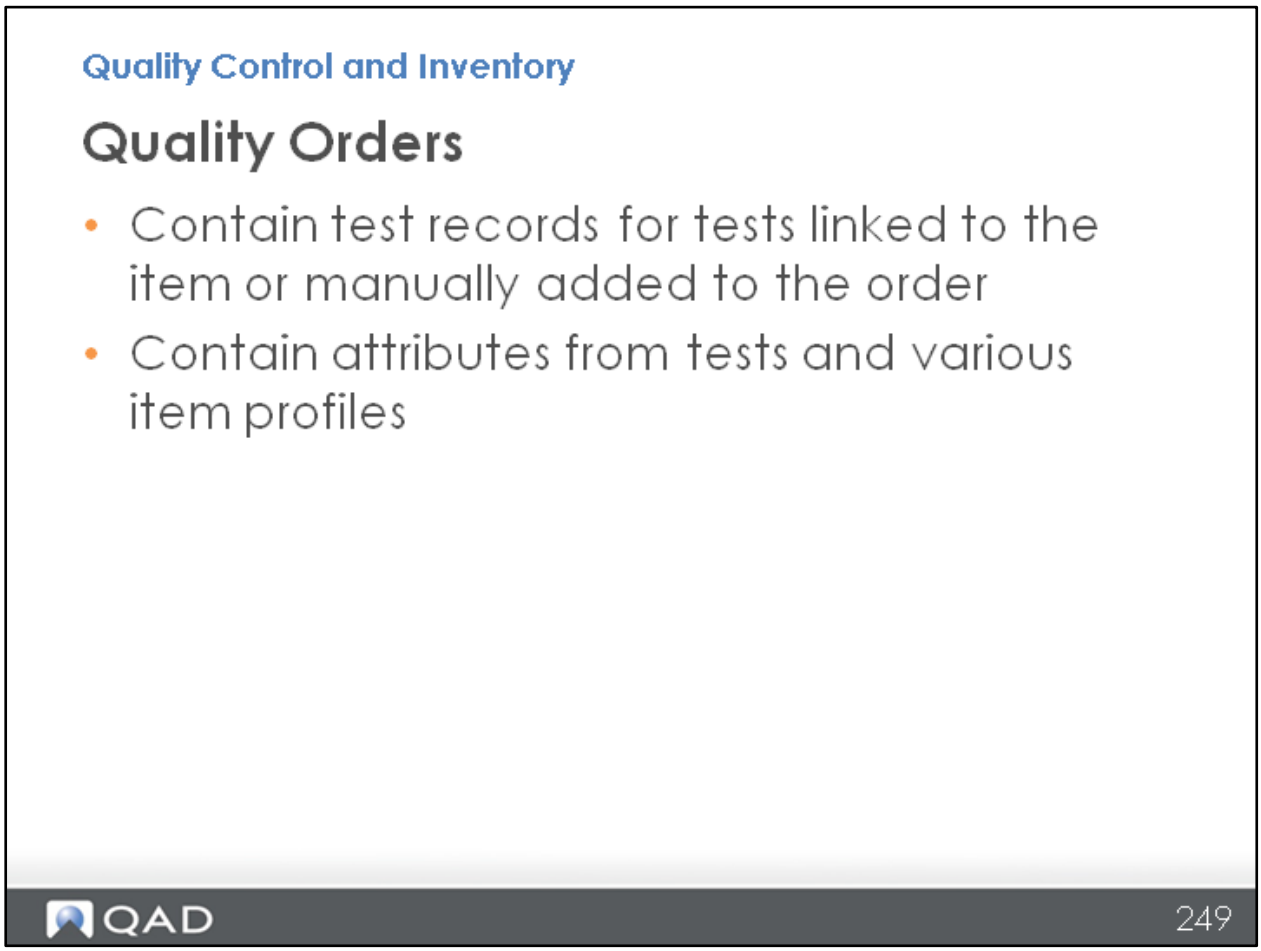


Use the View Item Lots collection to view lot attribute values, inventory, and transaction history with changes to lot attribute values.

Recording Values with Quality Orders



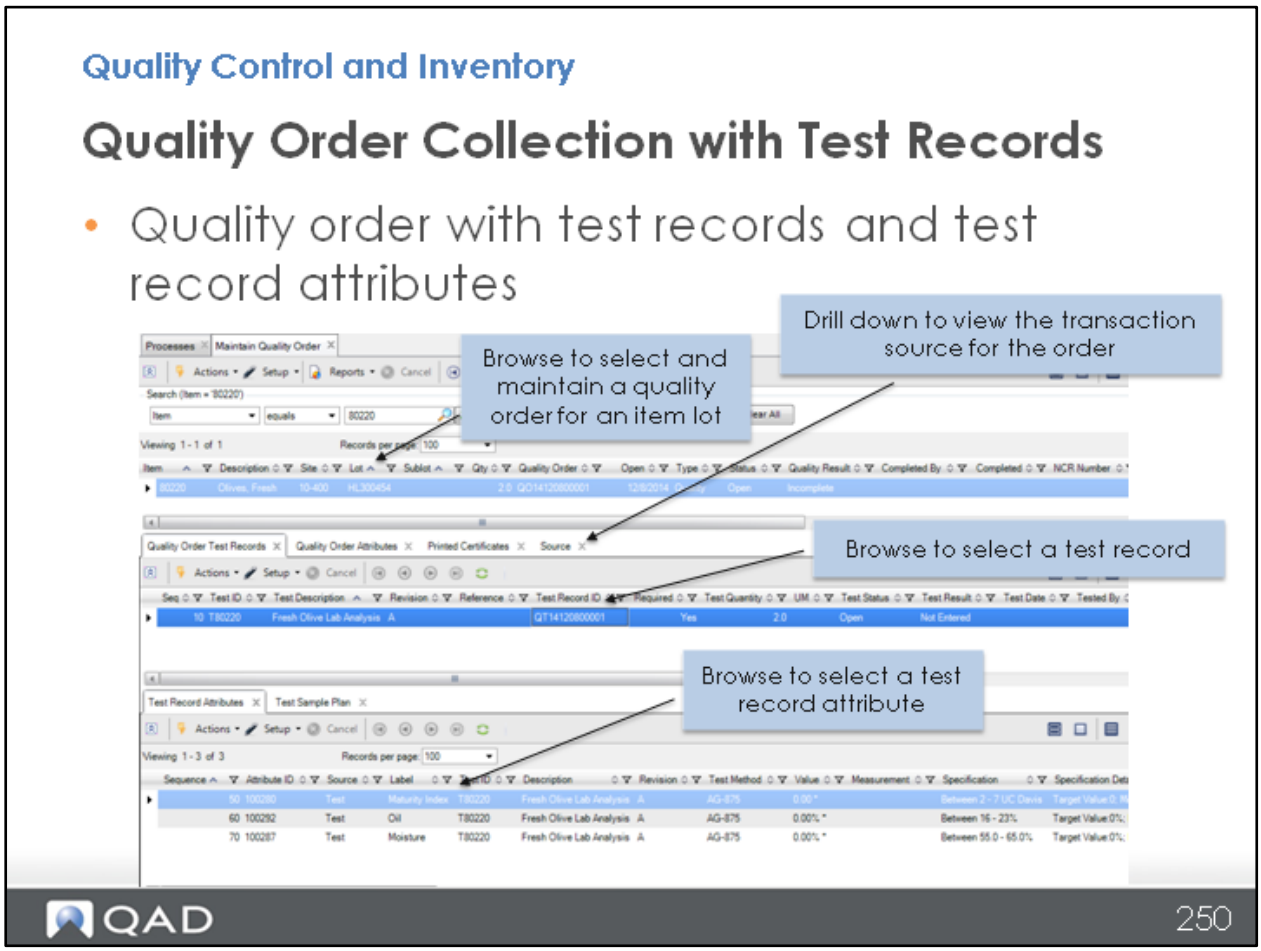
Quality Orders



Similarities with Lot Attribute Orders:

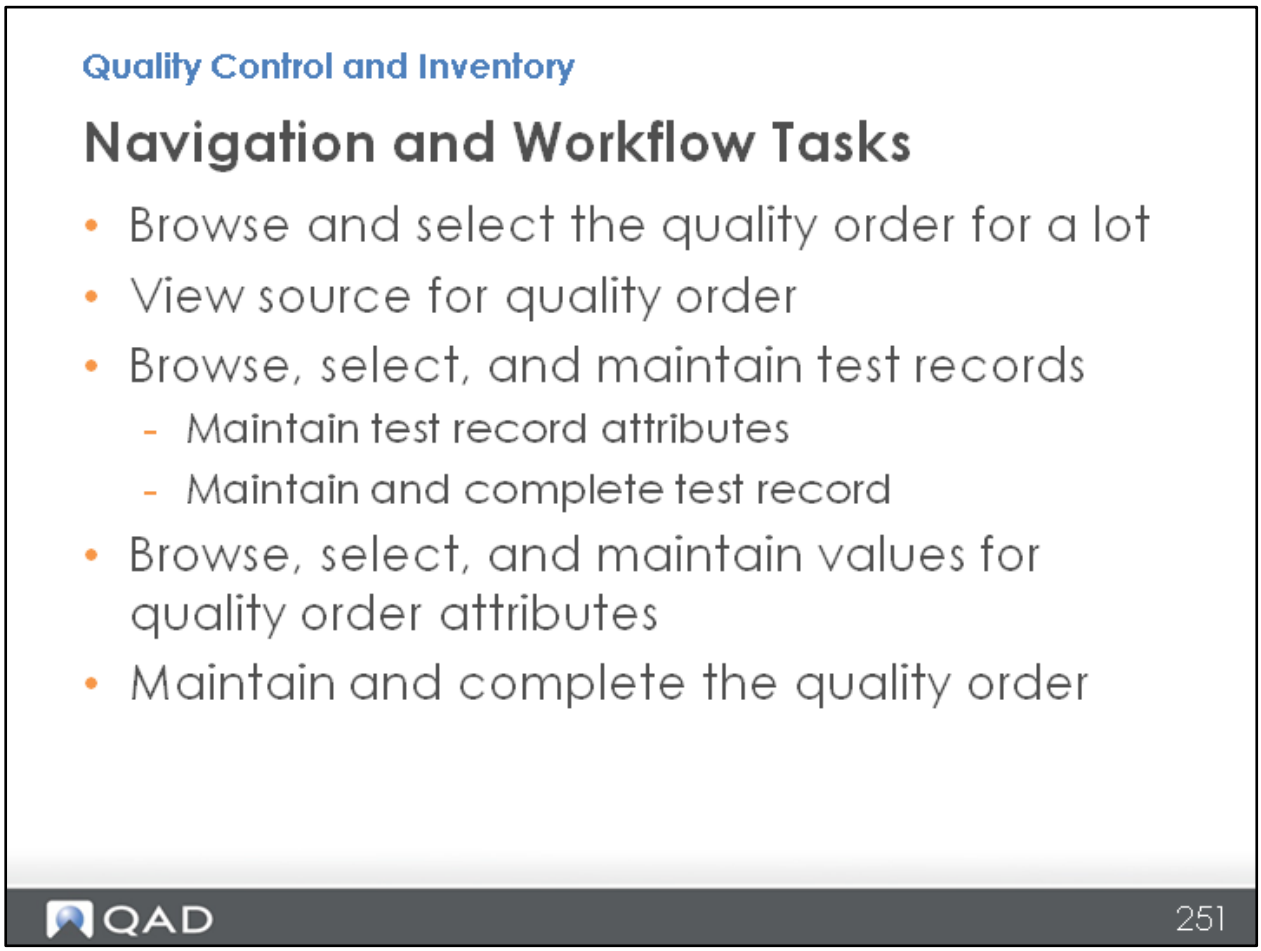
- Created automatically by receipts or created manually
- Contain lot attribute values
- Update lot master with attribute values

Quality Order Collection with Test Records



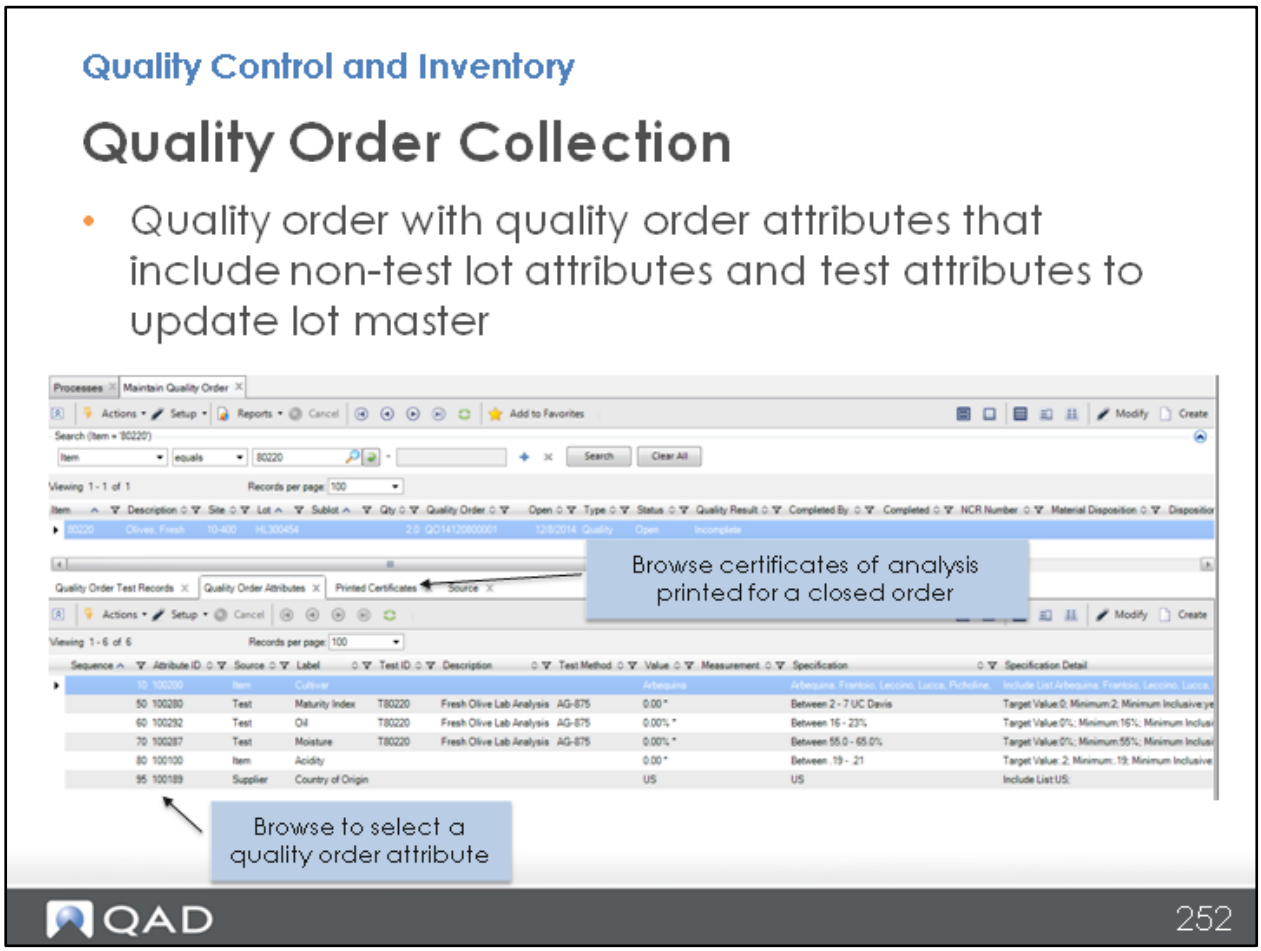
First, open the Maintain Quality Order Browse collection. Select the quality order that you intend to edit.

Navigation and Workflow Tasks



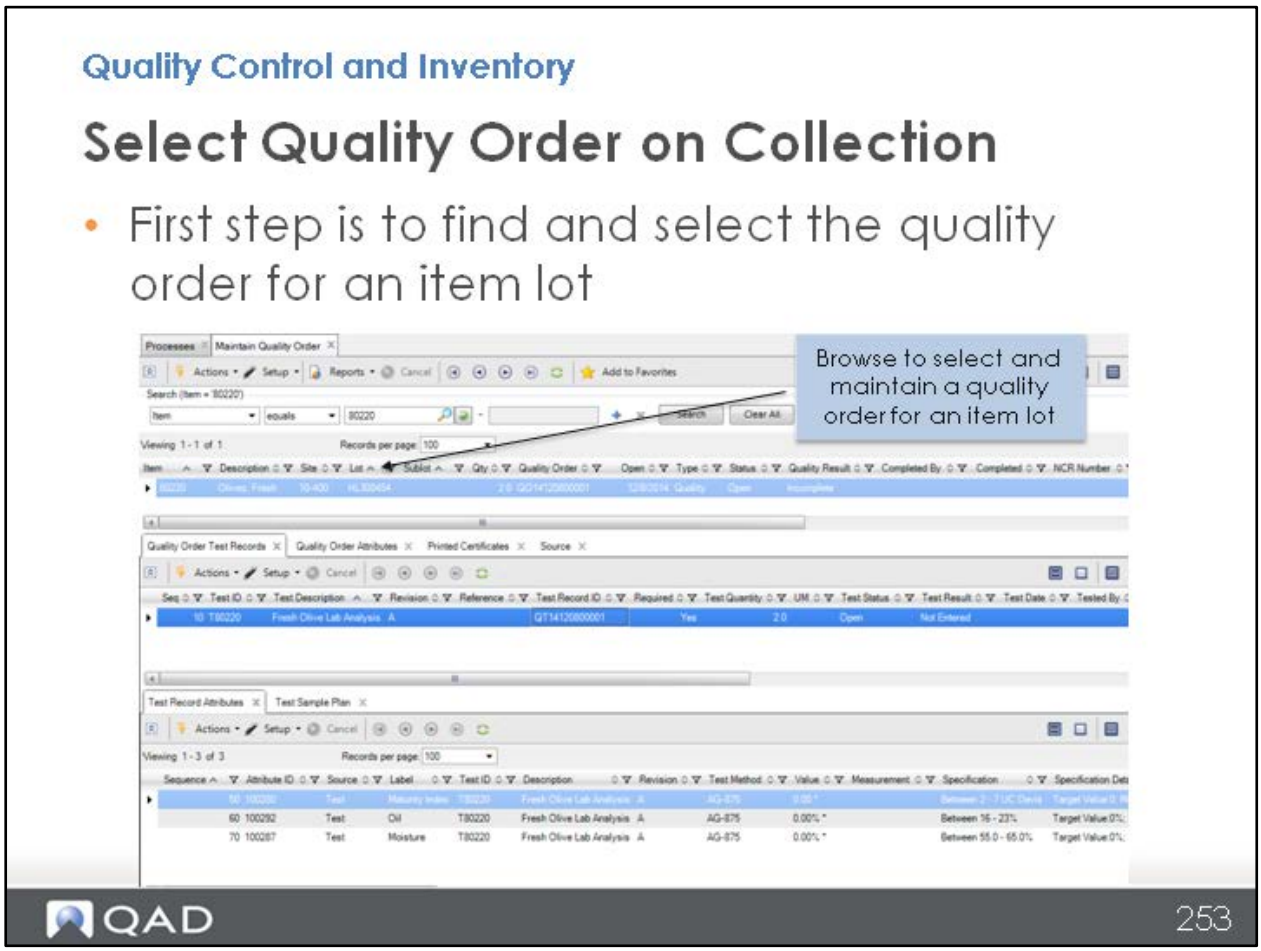
You can control the five steps that were just outlined through the five QAD EE processes outlined above. This section of the guide will now demonstrate these steps in greater detail.

Quality Order Collection



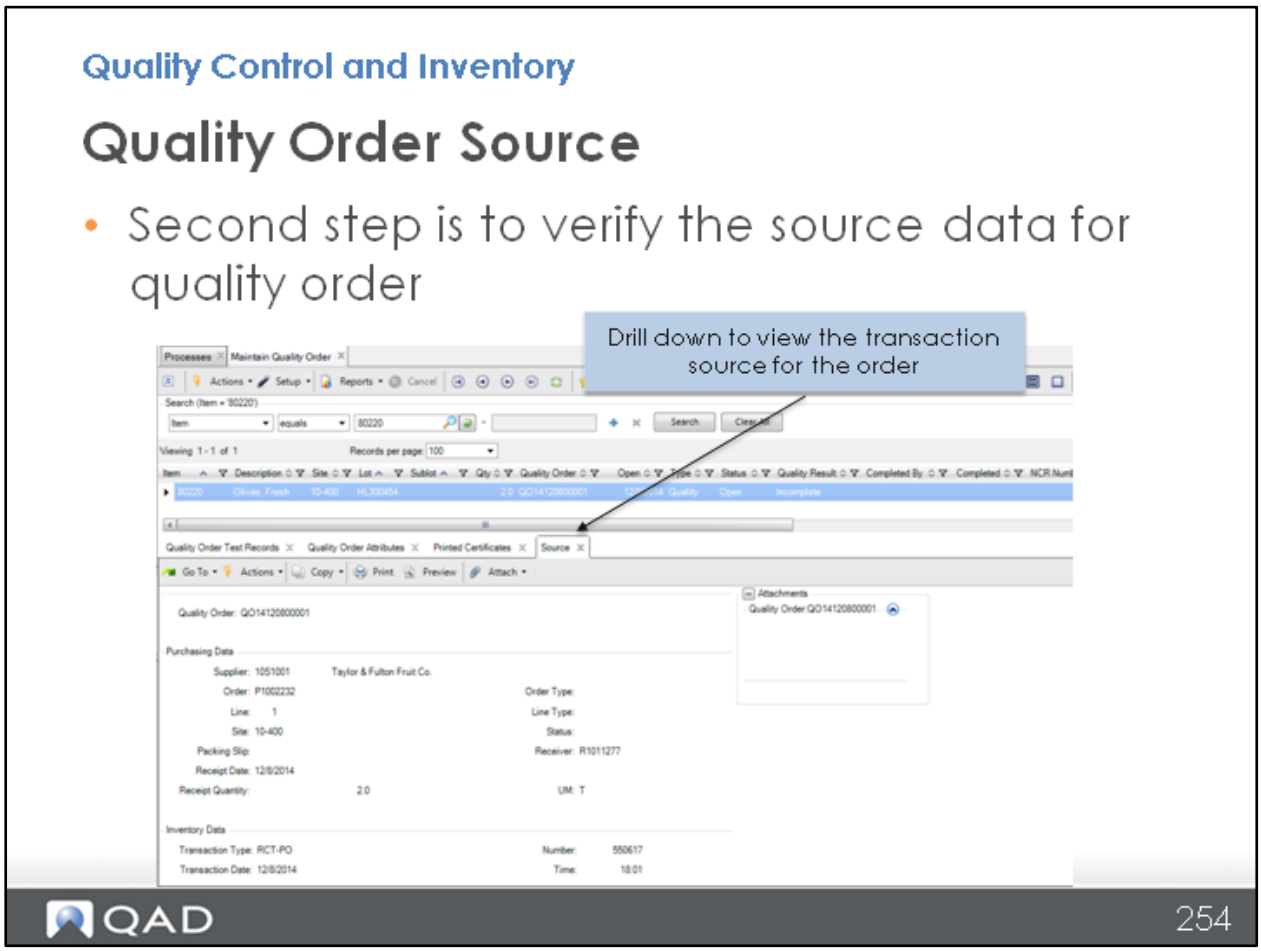
.

Select Quality Order on Collection



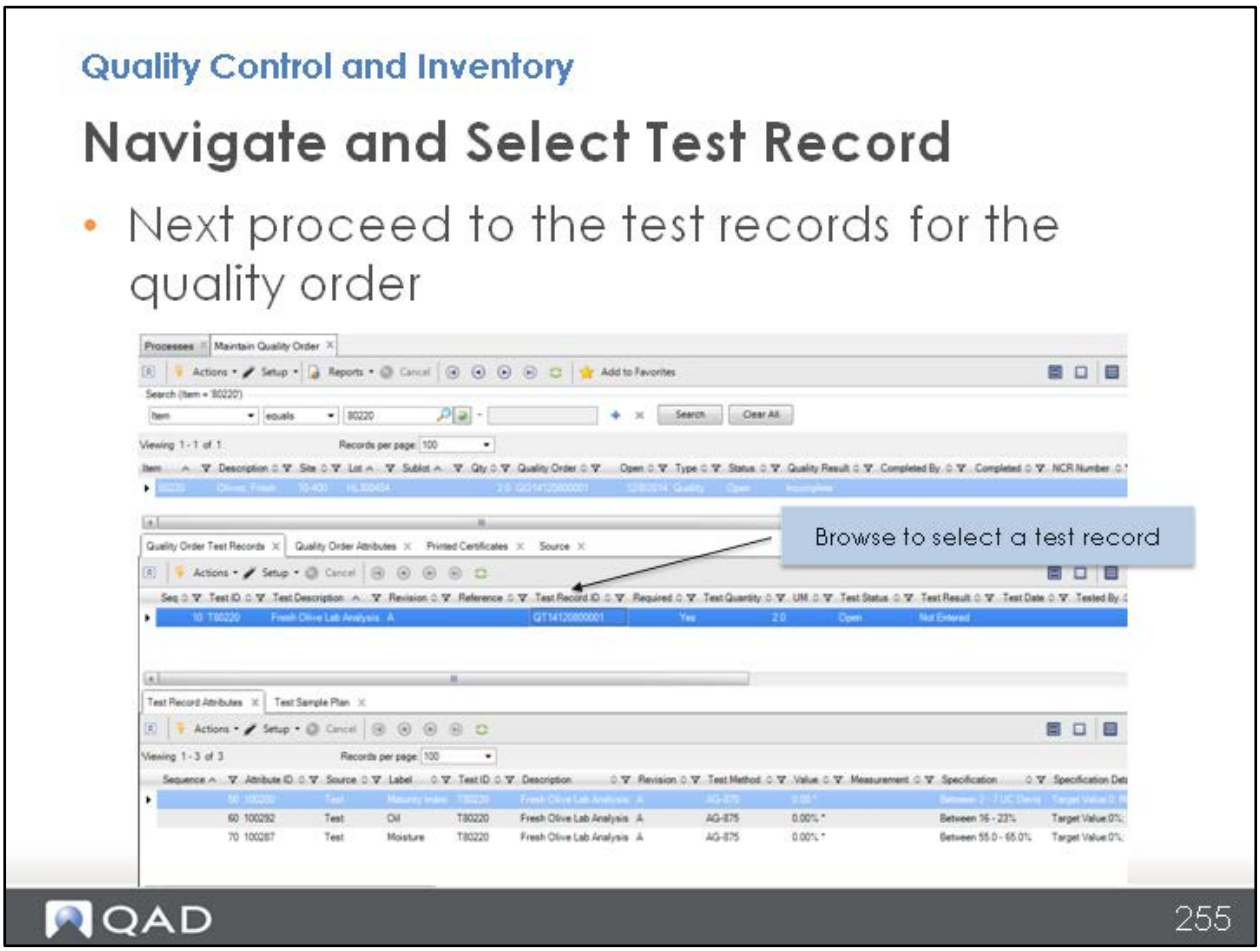
First, open the Maintain Quality Order Browse collection. Select the quality order that you intend to edit.

Quality Order Source



In the second level Source tab, you can view information involving the creation of the quality order. Use this information to verify that you are accessing the correct quality order.

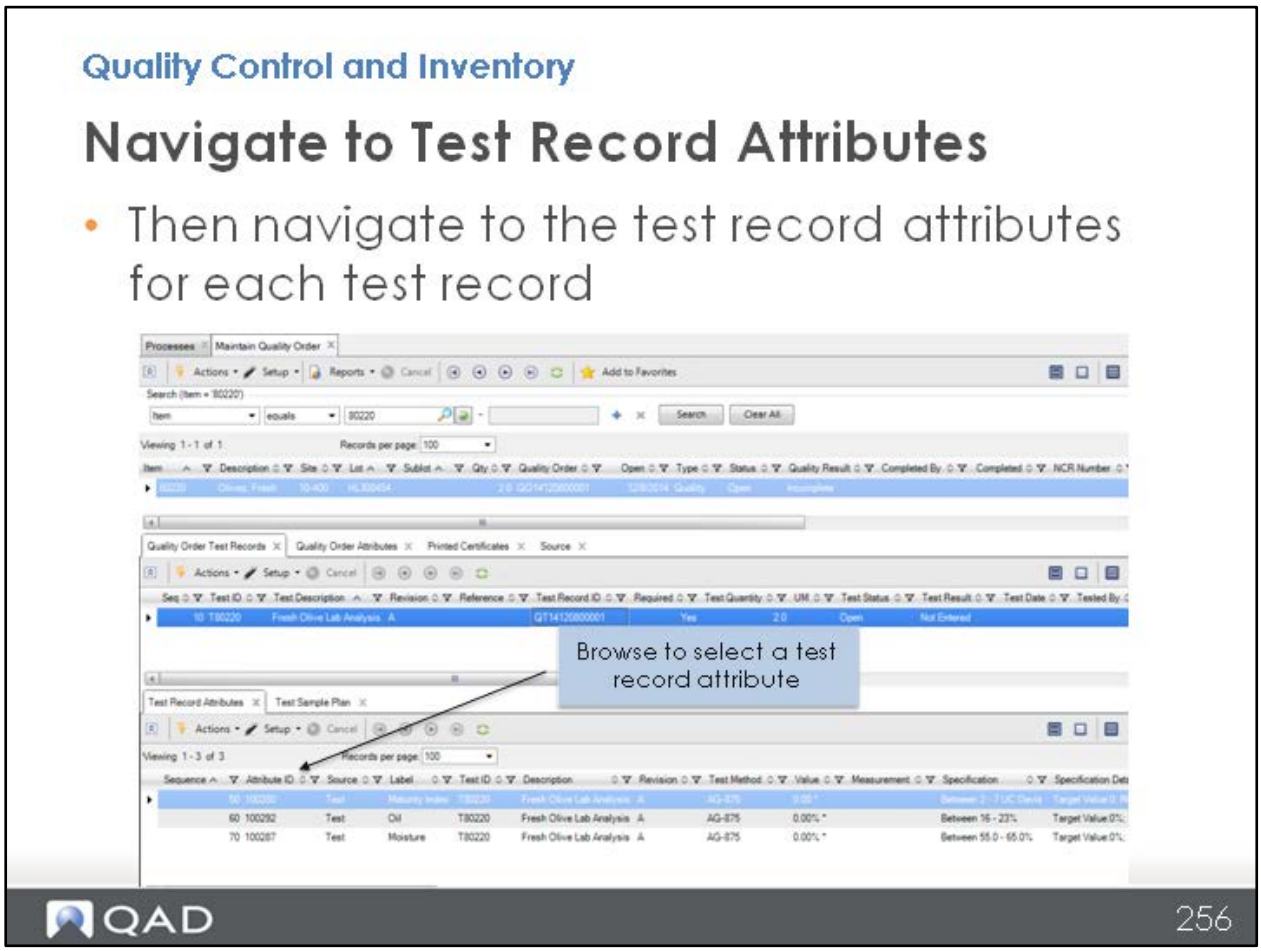
Navigate and Select Test Record



Select a test record in the second level Quality Order Test Records tab.

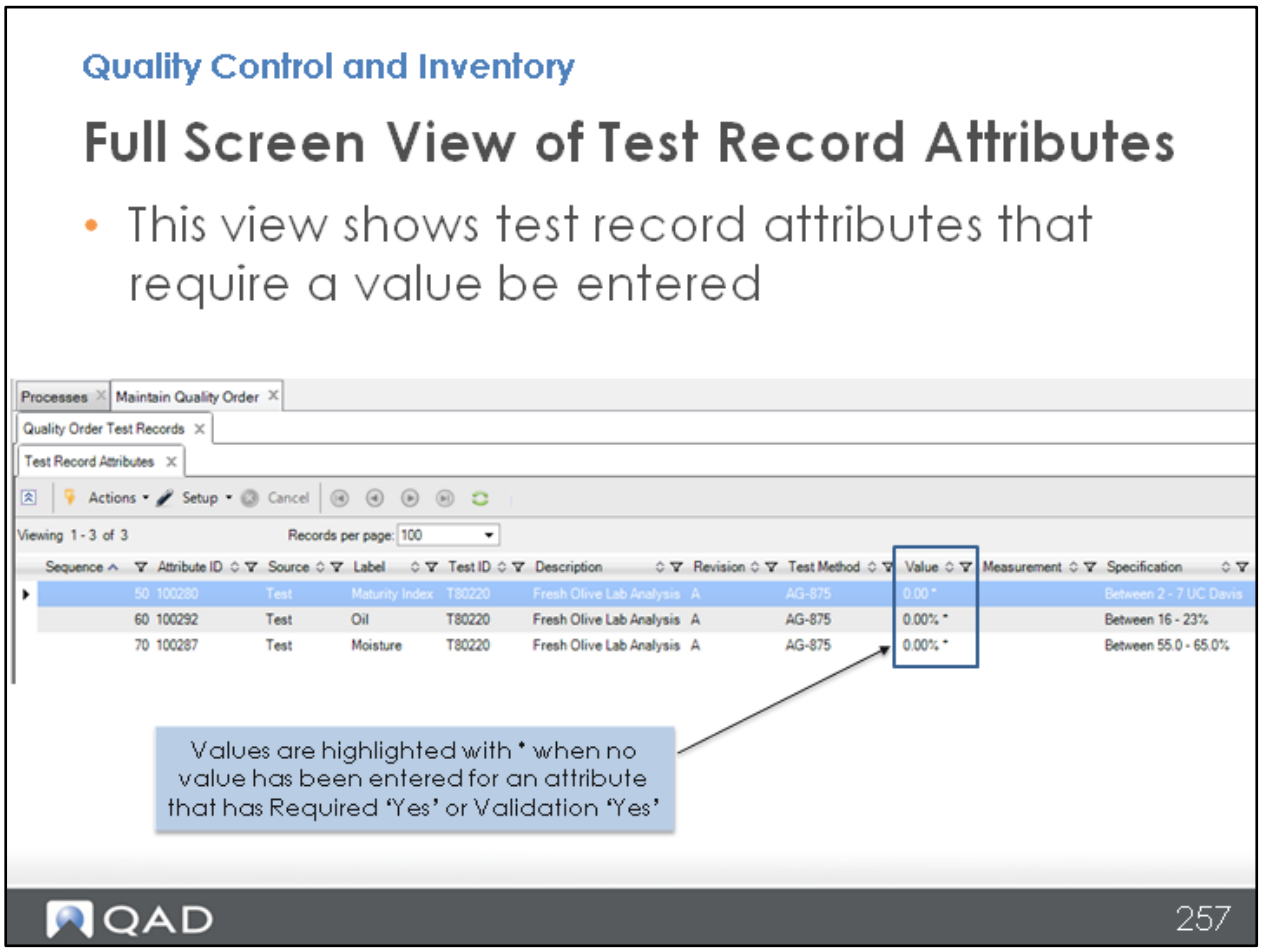
A test record is the collection of attributes associated with a certain test specification.

Navigate to Test Record Attributes



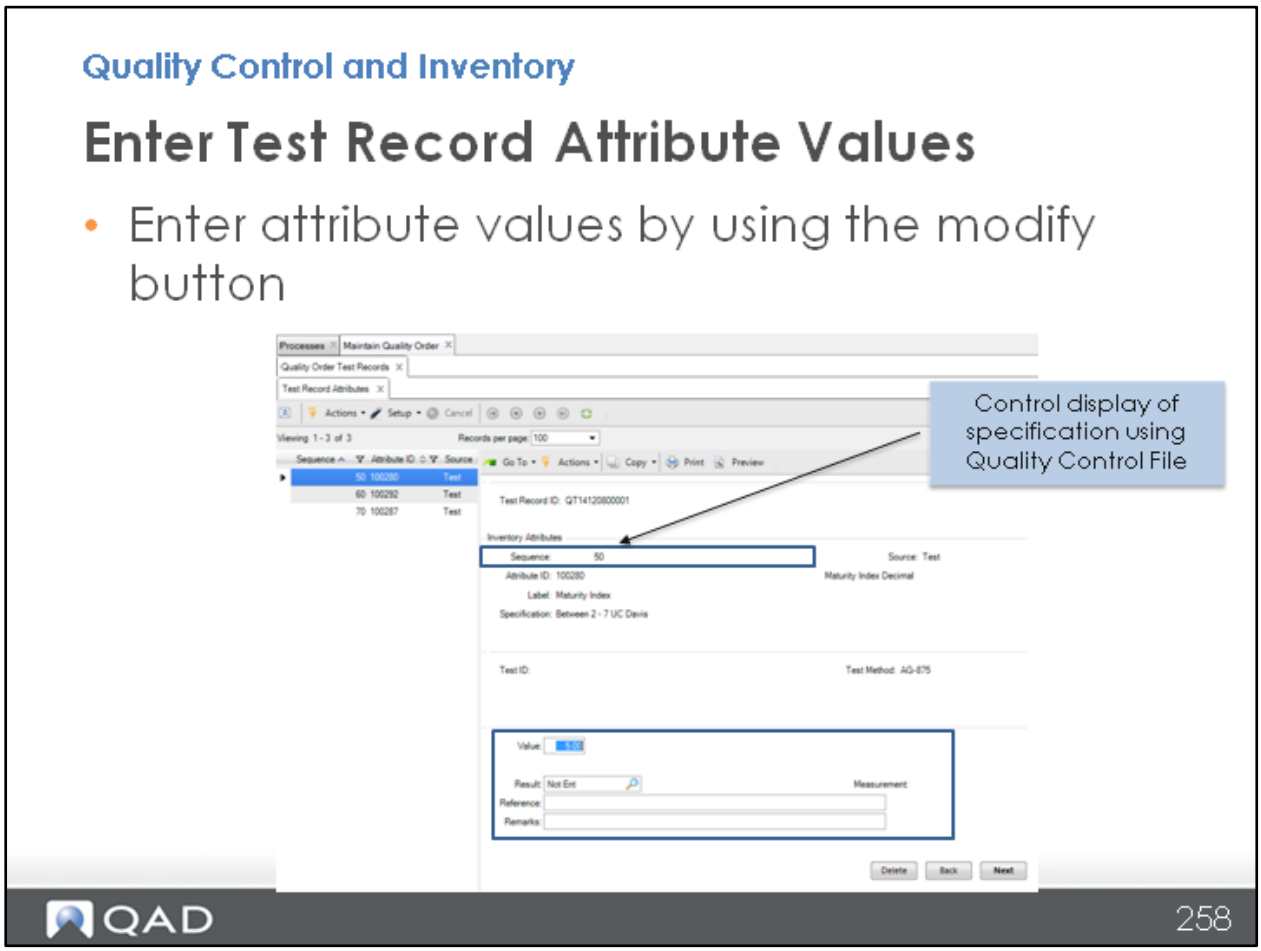
In the third level Test Record Attributes browse, you can view the attributes associated with the selected test record.

Full Screen View of Test Record Attributes



The Value field shows the value given or defaulted to an attribute. If an asterisk is present, then a value has not been given to or accepted for that attribute, and that is a required and validating attribute.

Enter Test Record Attribute Values

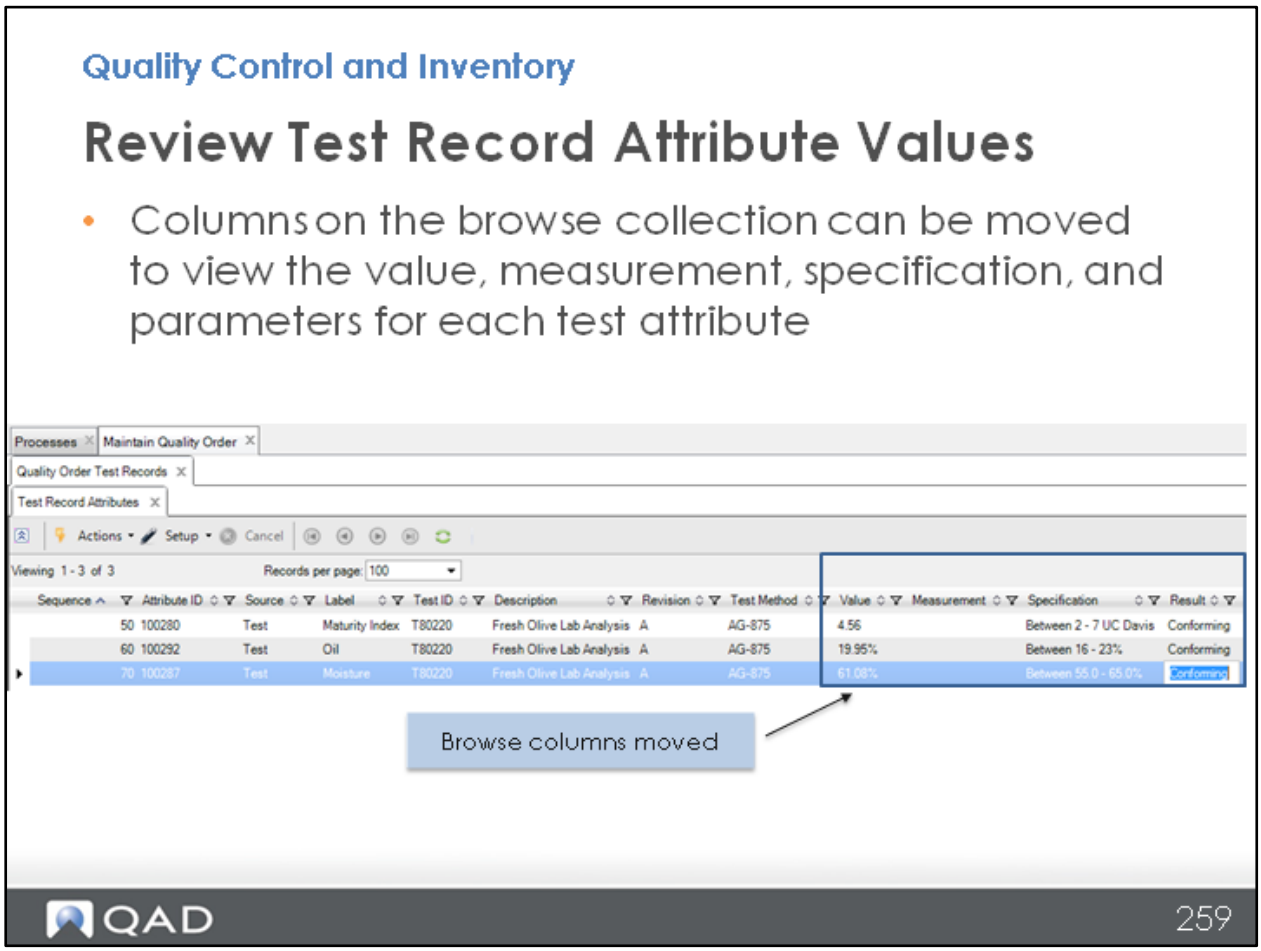


By modifying an attribute, you can provide a value to the attribute.

This Specification for that attribute may or may not appear based on the settings in the Quality Control File.

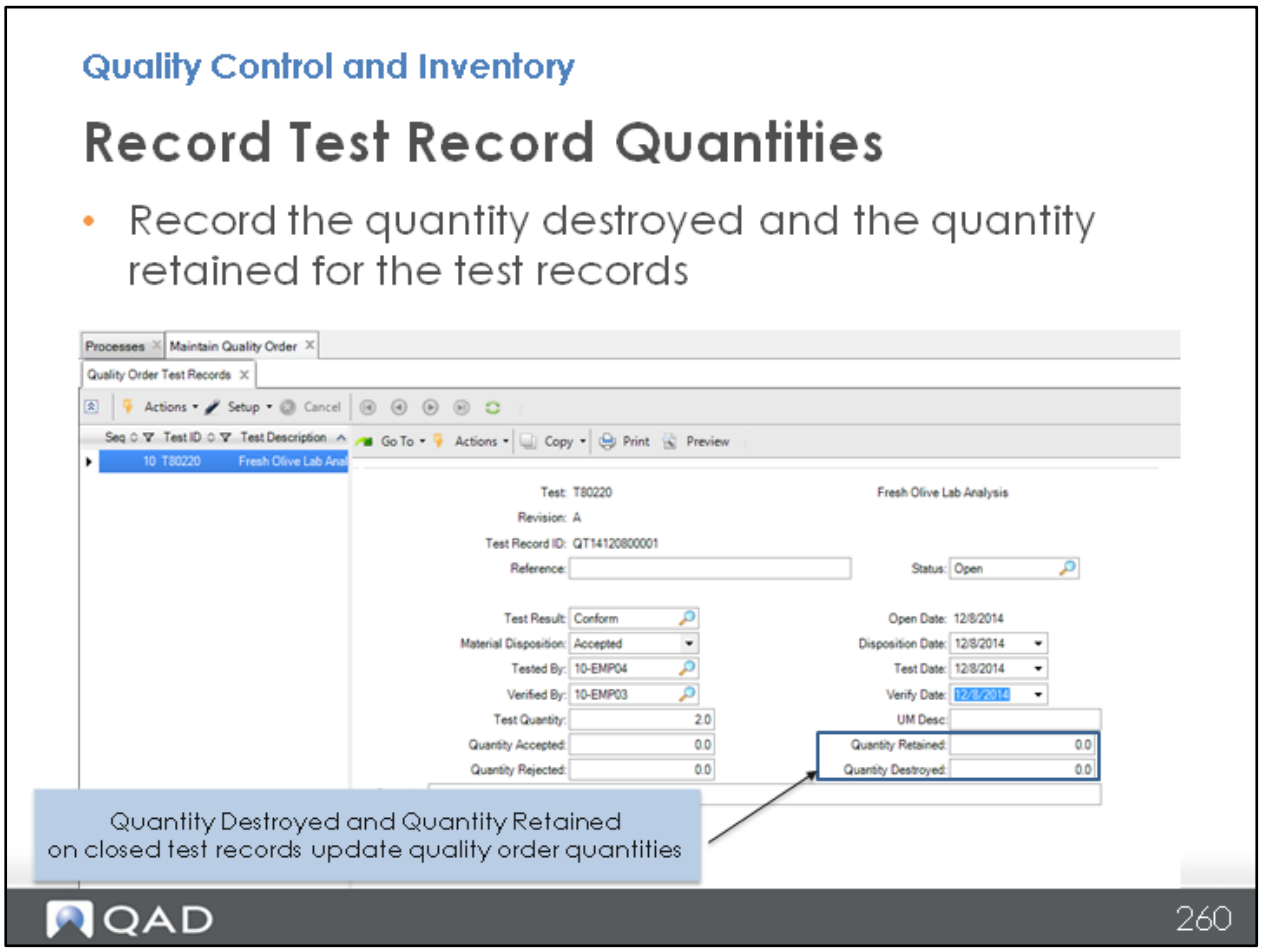
If the attribute is validating, the Result field will change to Conforming or Non-Conforming depending on the value. Otherwise, it will become blank.

Review Test Record Attribute Values



In the graphic above, columns have been moved to make the changes clear. You can see that the Value and Result fields have changed for each attribute.

Record Test Record Quantities

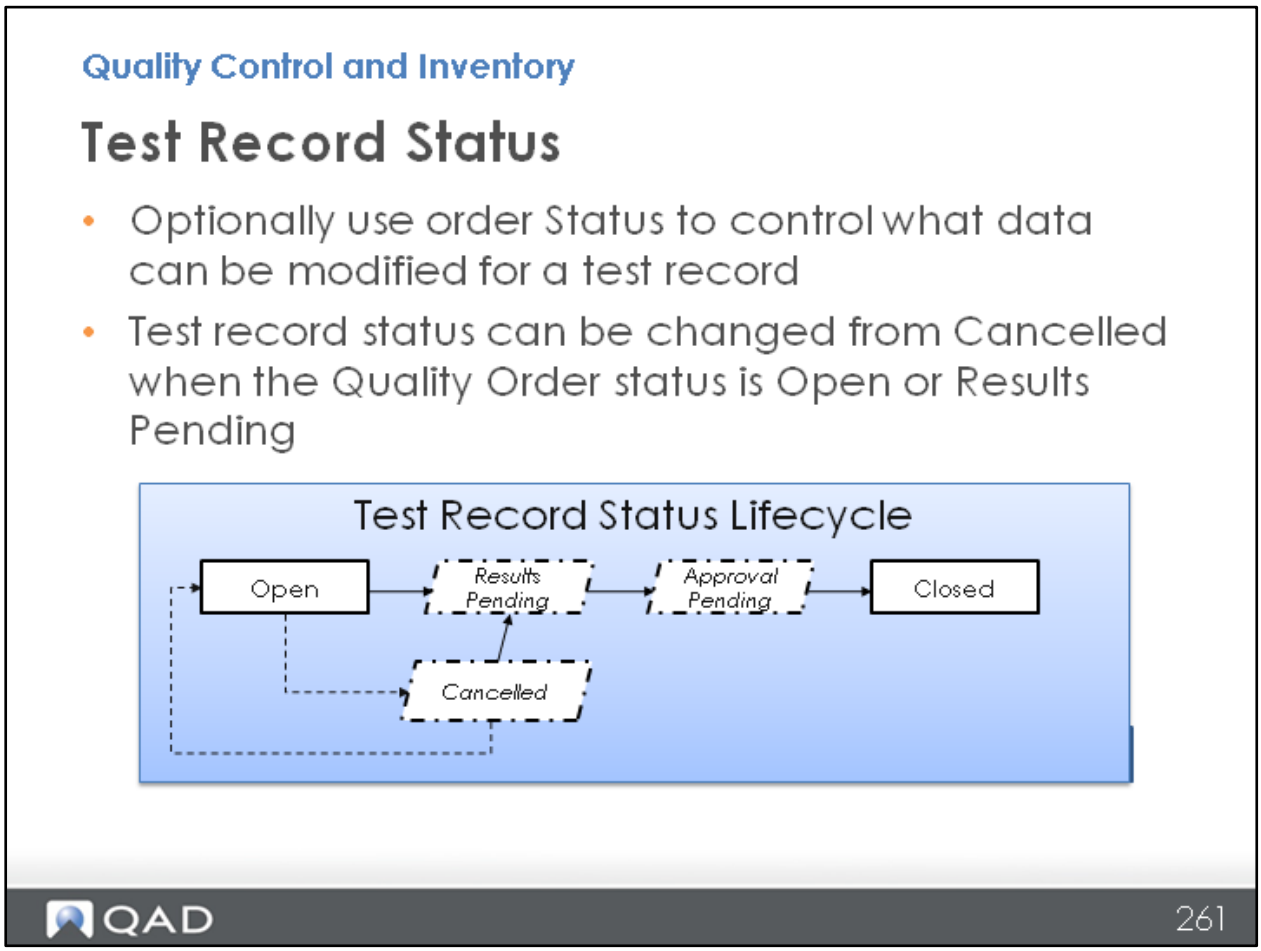


Test records have a Test Result of Not Entered until each required attribute has been entered.

The Test Result changes automatically to either Conforming or Non-conforming depending on the results for validating attributes.

A person can manually change the Test Result. This is useful when a result of No Data or Inconclusive is appropriate.

Test Record Status



Each test record Status which determines its position in the workflow.

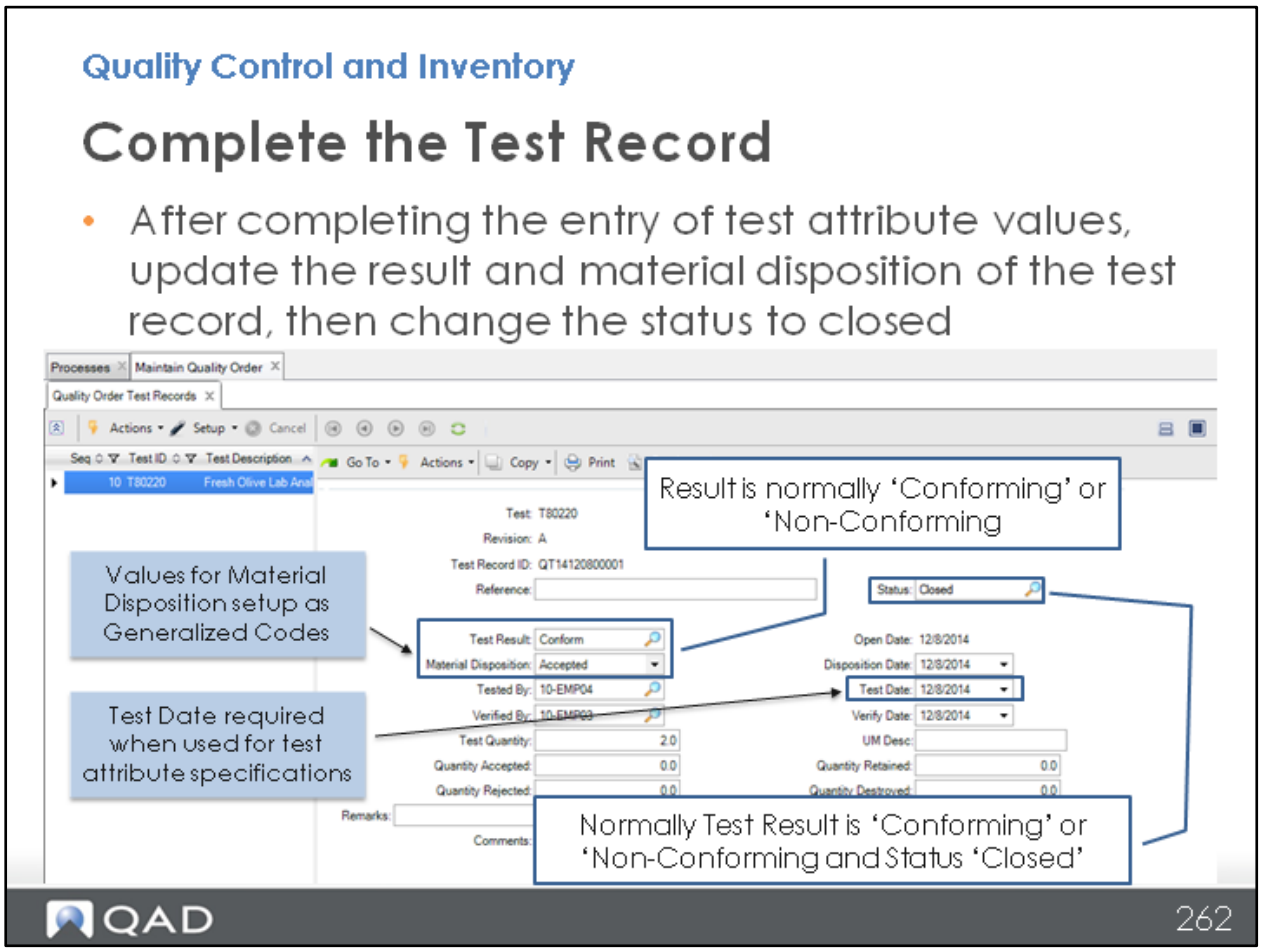
The following statuses are available:

- **Open**. The default status when the test record is created. When the status is Open, subsequent receipts for the same item and lot will increment the order quantity for the Test Record. The status can be changed from Open to Results Pending, Approval Pending, Closed, or Cancelled.
- **Results Pending.** You can optionally change the status to Results Pending when the entire quantity for the test is available. When the status is Results Pending, the Test Quantity is not automatically updated by subsequent receipts for the item and lot.
- **Approval Pending.** You can optionally change the status to Approval Pending after the order results and the attribute values and results for the test record have been recorded. When the status is Approval Pending, the test record attribute values cannot be modified.
- **Cancelled.** Change the status to Cancelled when the test record is not required and will not be completed.

  Note: If the status of a test record was changed to Cancelled by mistake, you can change the status when the Quality Order status is Open or Results Pending.

- **Closed**. Change the status to Closed when the test results and its attribute results are final. When the status is changed to Closed, the values for the test attributes can be copied to its quality order.
- **Closed Edit Pending.** The status that is assigned by the system when an administrator edits a closed order using the Edit Closed Test Record function. Using that function the status can then be changed back to Closed.

Complete the Test Record

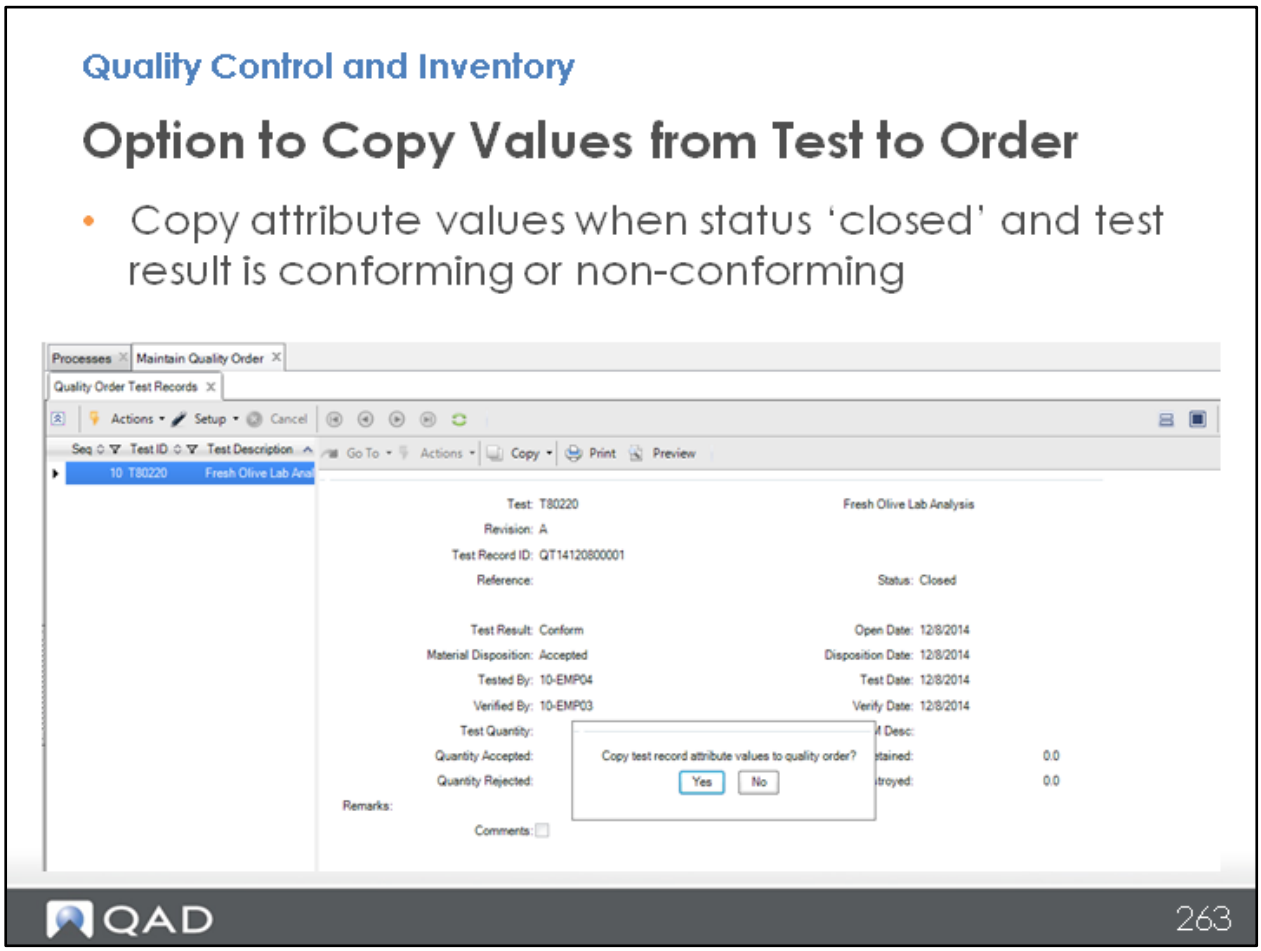


Test records have a Test Result of either 'Not Entered' or 'Incomplete' until all attributes that are required or have validation have entered values.

The Test Result changes automatically to either 'Conforming' or 'Non-conforming' depending on the outcome of having validated attribute values.

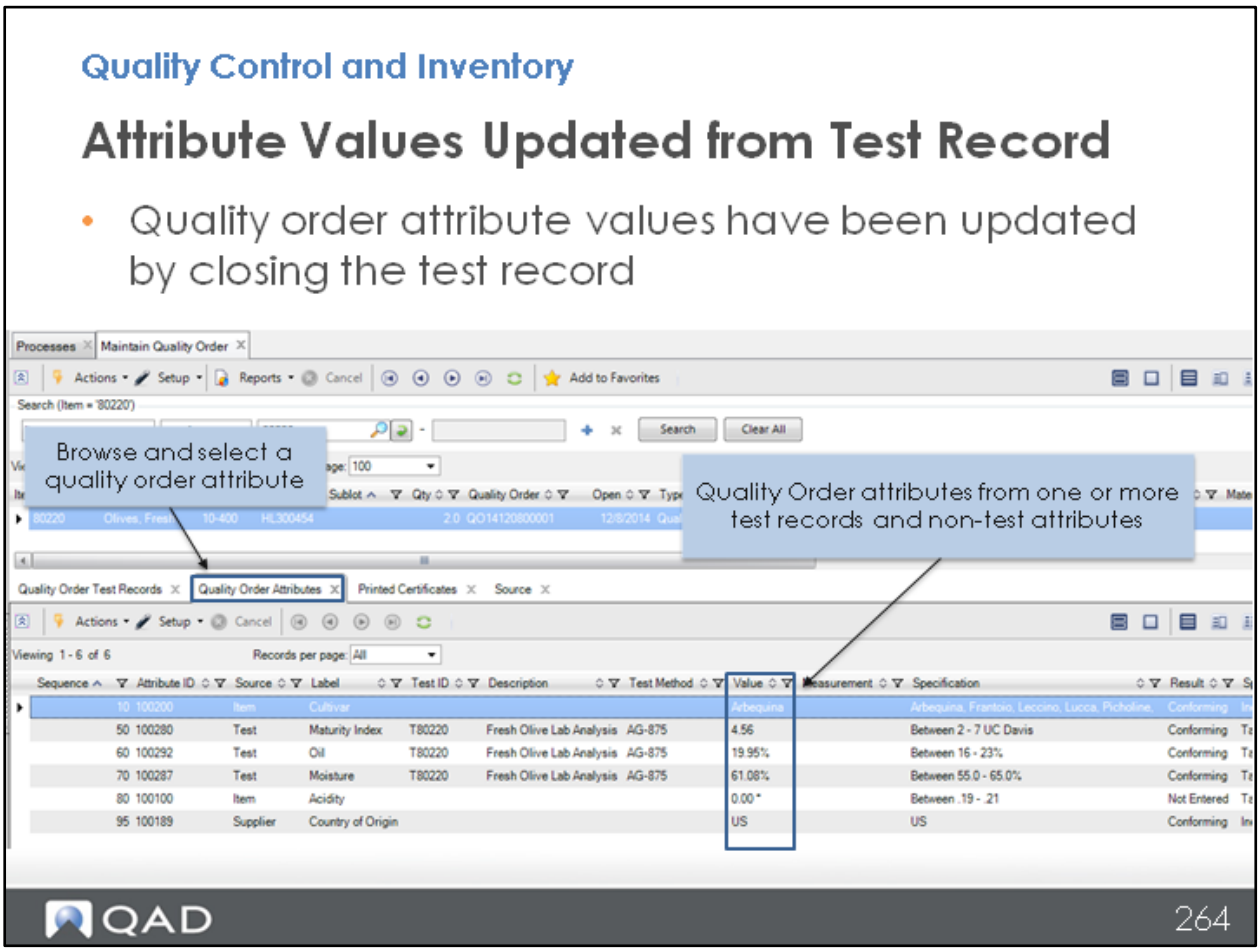
A person can manually change the Test Result. This is useful when a result of 'No Data' or 'Inconclusive' is appropriate.

Option to Copy Values from Test to Order



After closing the quality order, the system prompts you to copy the test records attributes to the quality order. Click Yes to confirm the copy of attribute values.

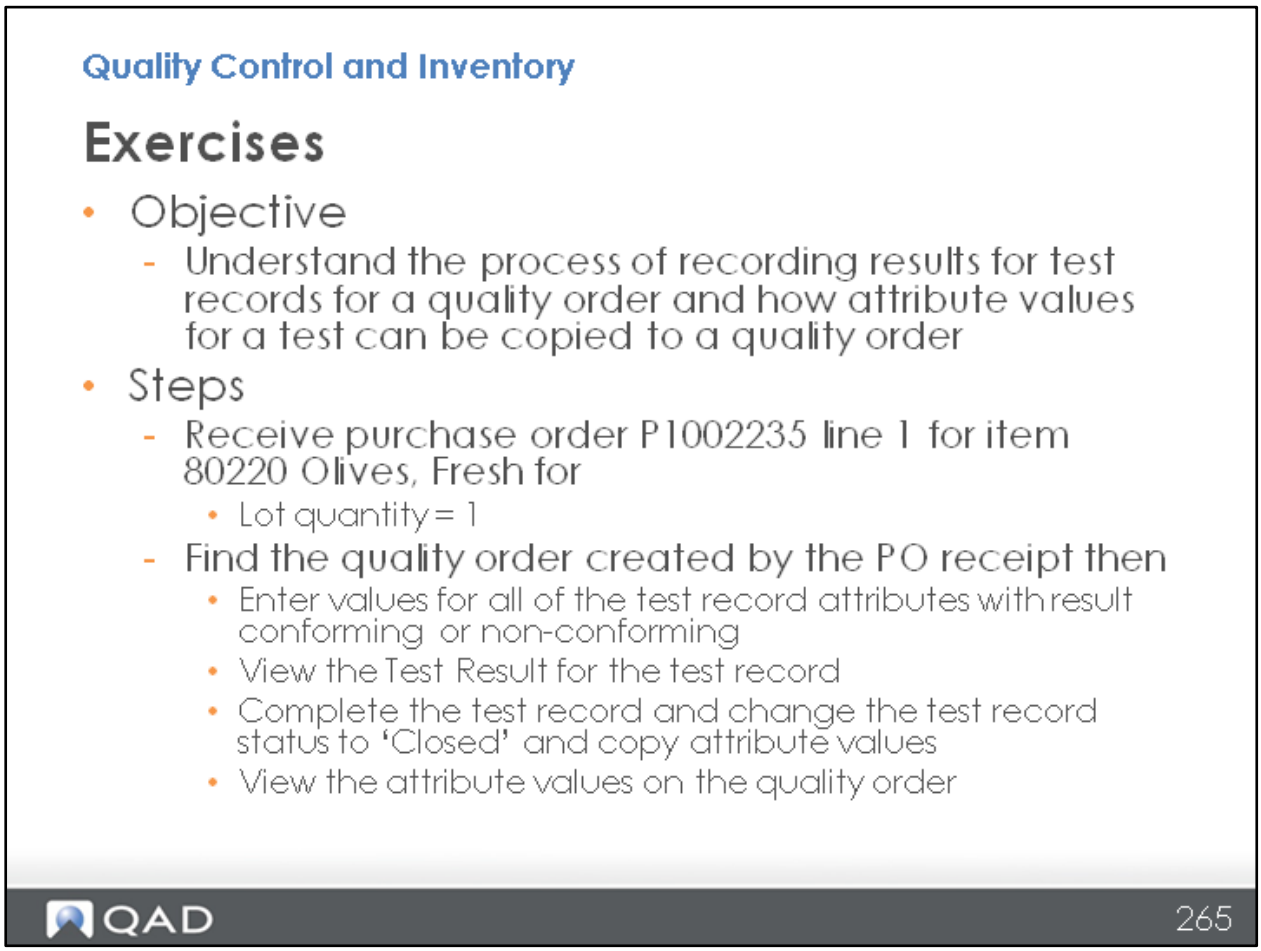
Attribute Values Updated from Test Record



The second level Quality Order Attributes tab in the Maintain Quality Order browse collection displays the attributes on the quality order.

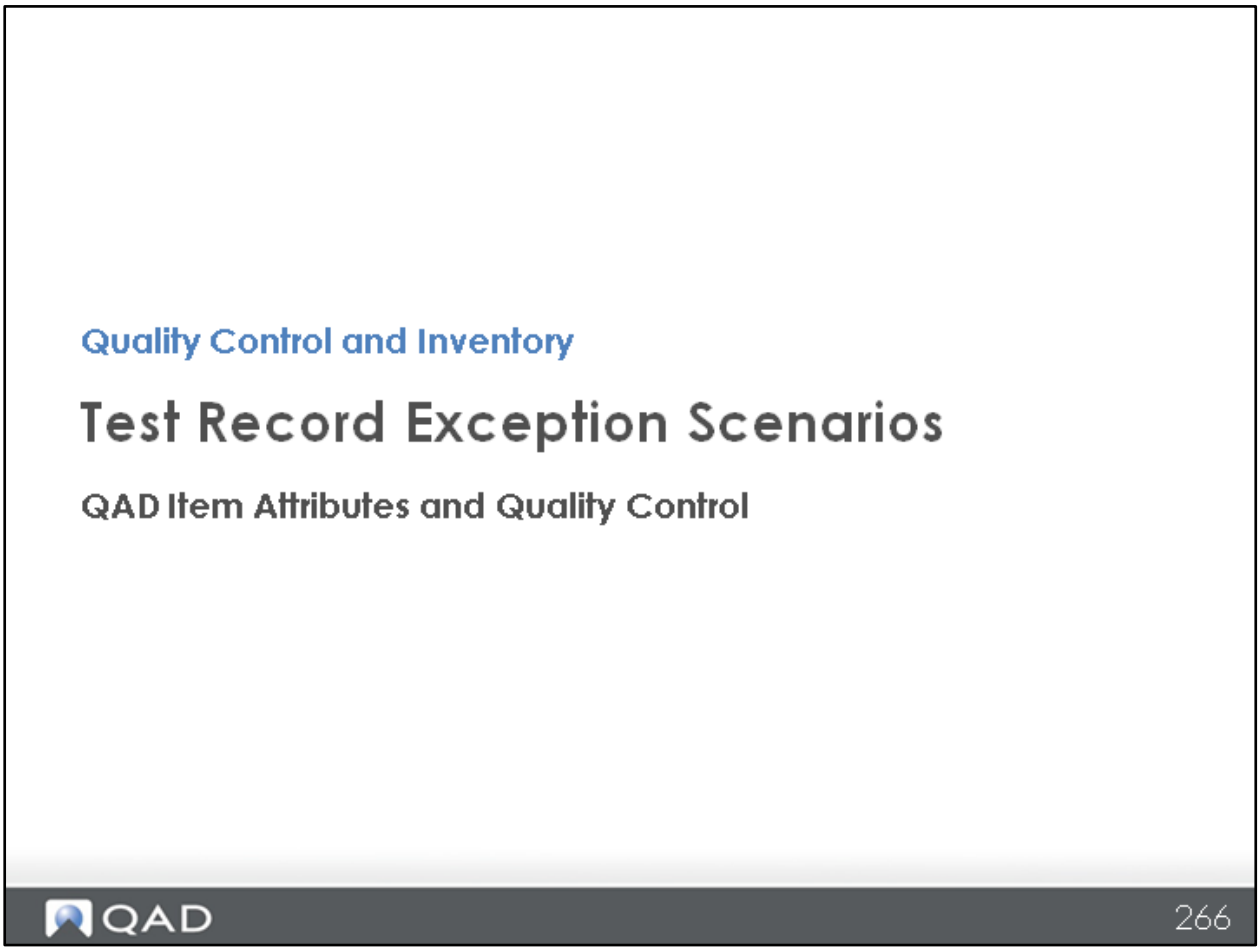
The Source field displays the source of that attribute. Attributes from a test specification have a Source value of Test.

Exercises

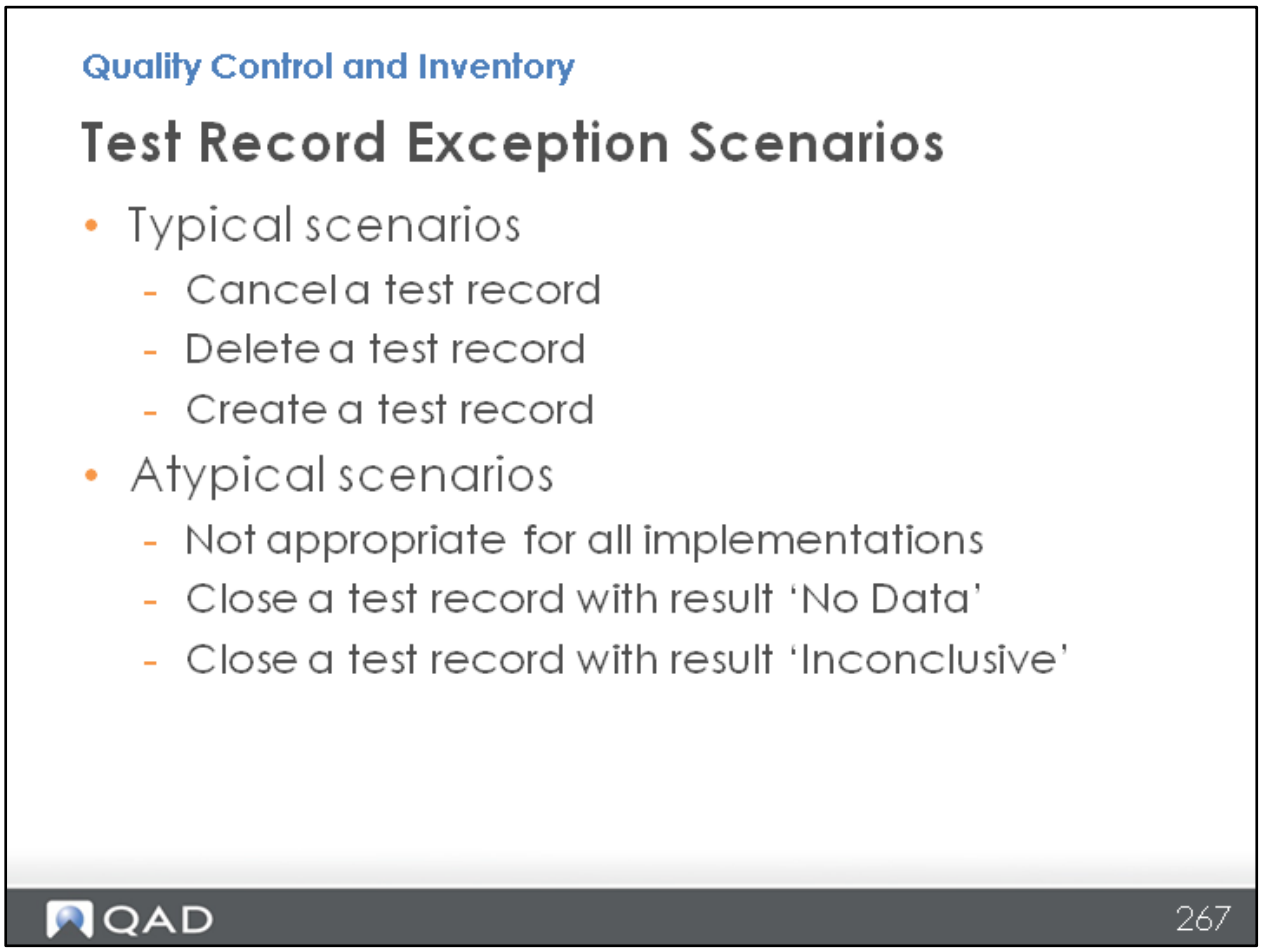


Values for quantity destroyed and quantity retained should be zero (0).

Test Record Exception Scenarios



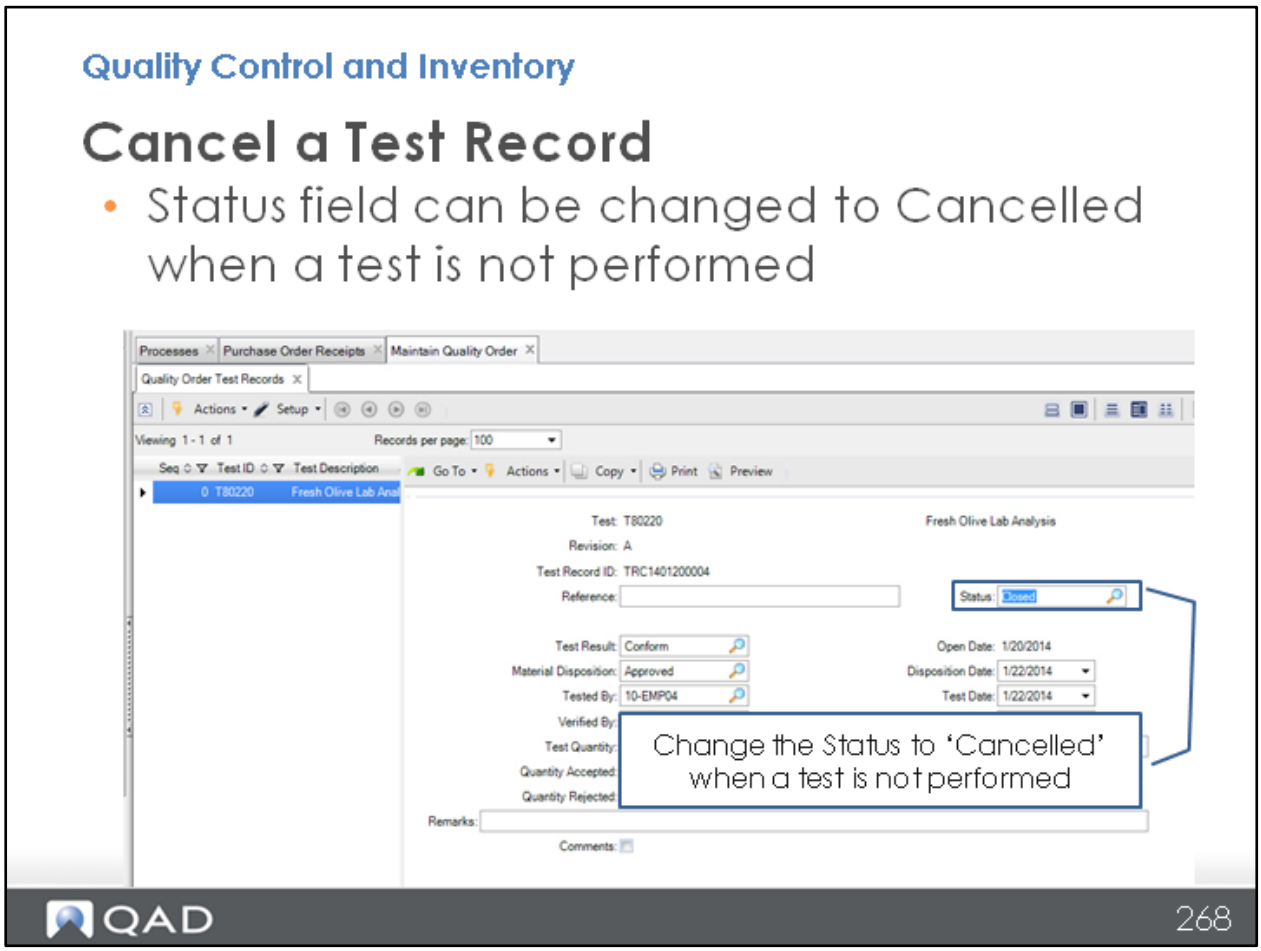
Test Record Exception Scenarios



Create a test record when more than one test record is required for a test specification or when a test is required for a test specification is not linked to the item.

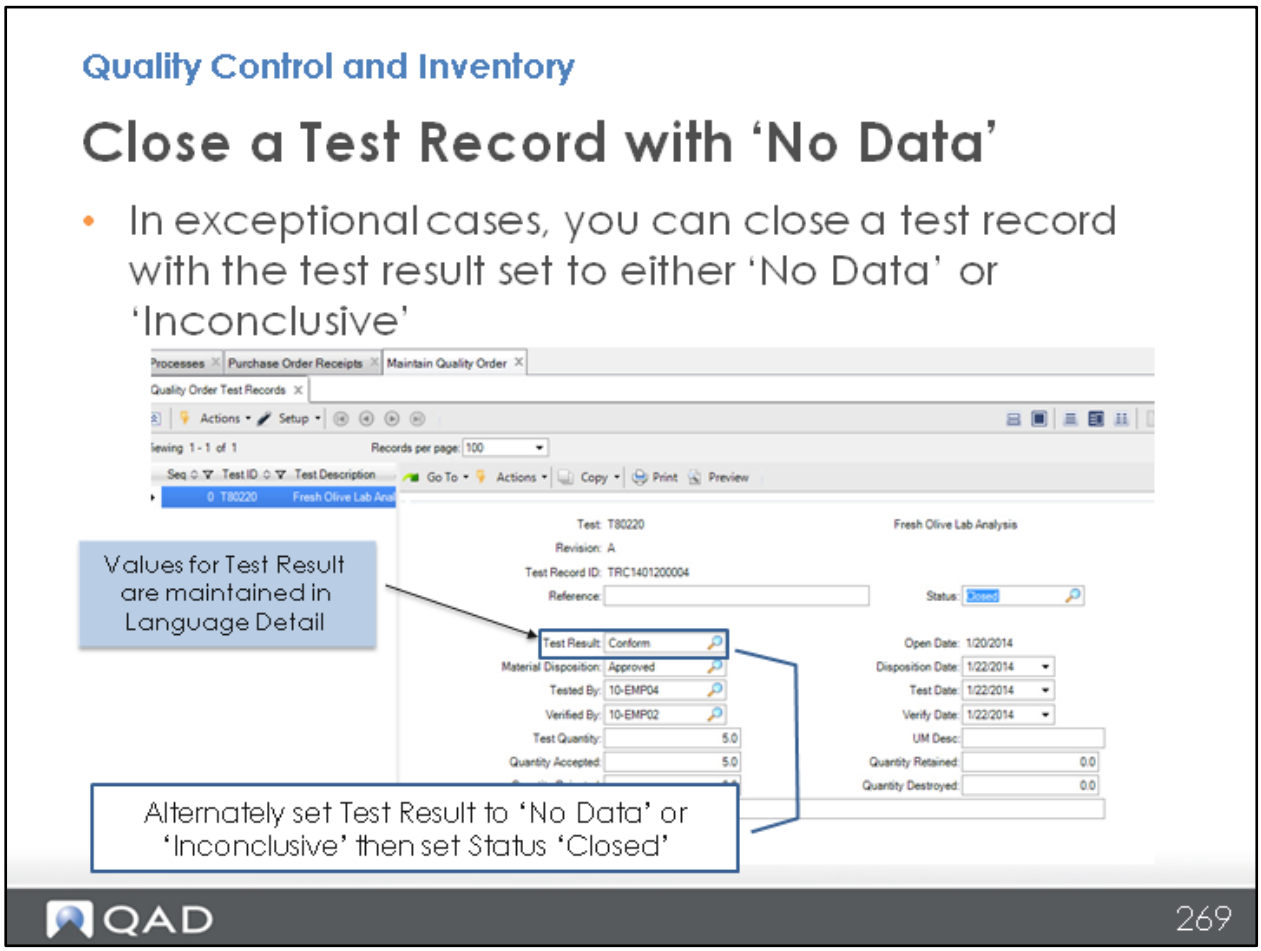
Closing a test record with No Data or Inconclusive are not typical and may not be appropriate for an implementation.

Cancel a Test Record



A test that is normally required but not performed can be cancelled. To do so, switch the Status field of an open test record to Cancelled.

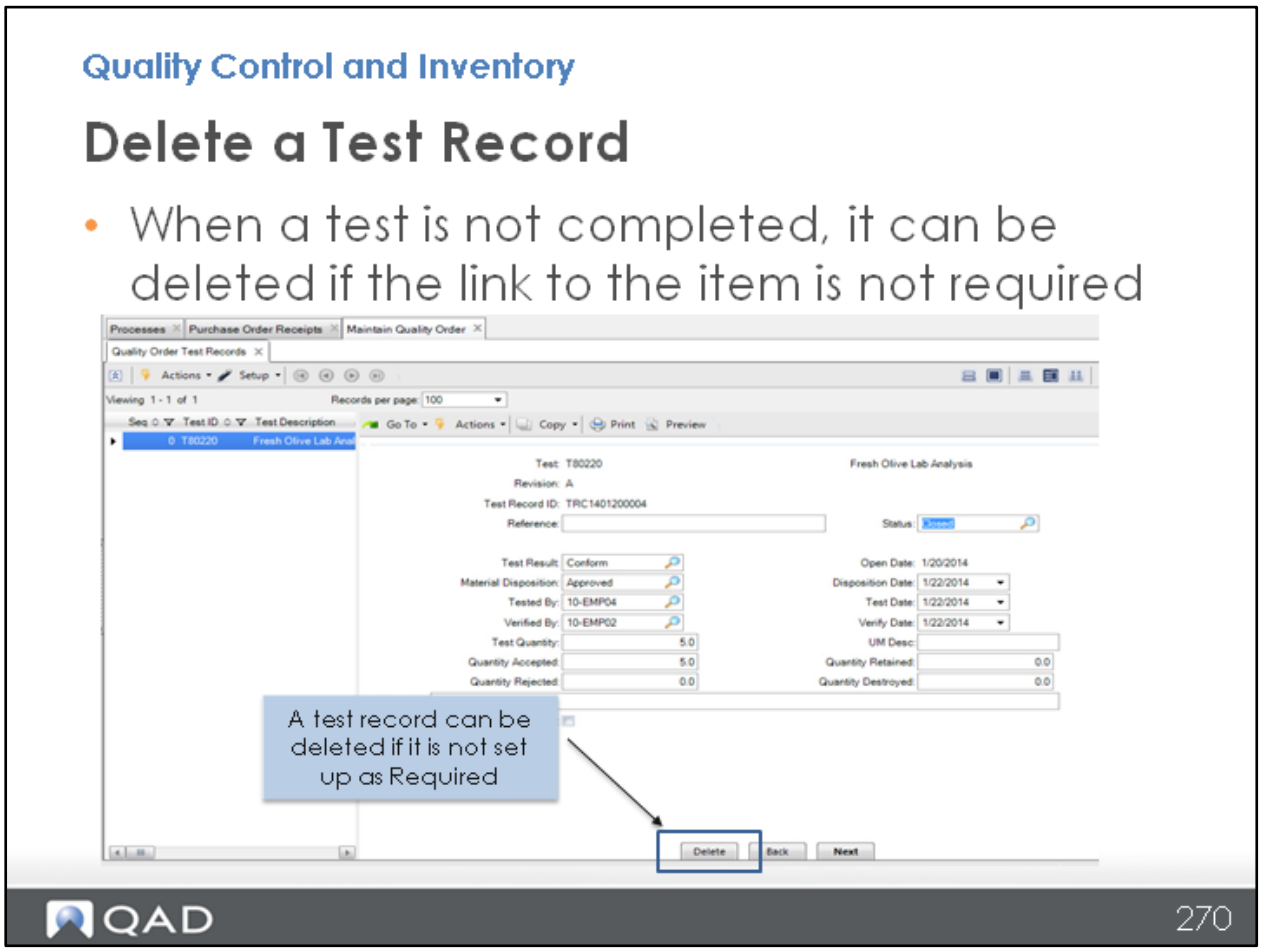
Close a Test Record with ‘No Data’



Alternately, you can set the Status to Closed and set the Test Result to ‘No Data’ or ‘Inconclusive’. This is appropriate when the test was complete, but did not provide definitive results.

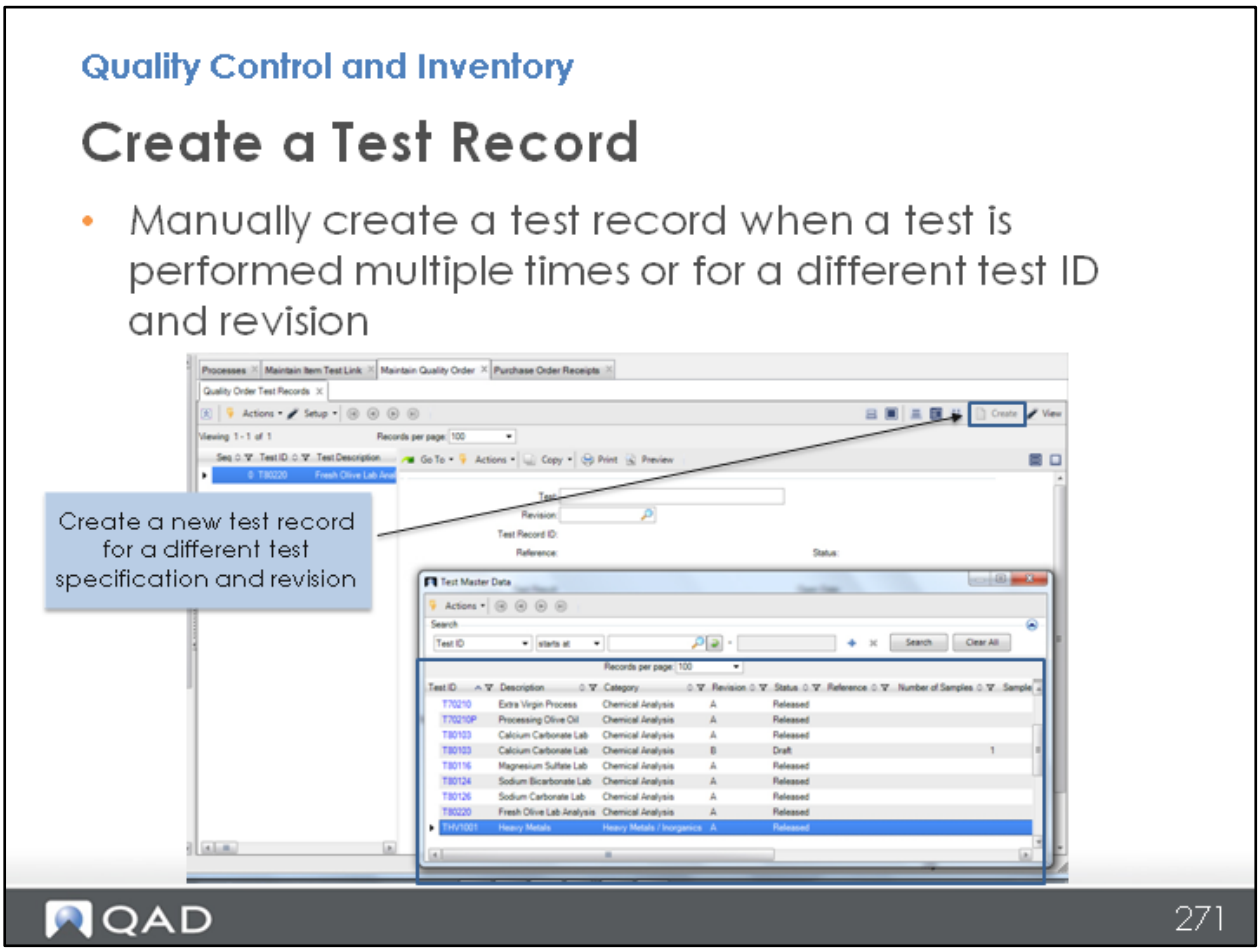
Closing a test record with No Data or Inconclusive are not typical and may not be appropriate for an implementation.

Delete a Test Record



You can delete Test Records which are not set as required. This is useful when a special quality order does not necessitate certain tests.

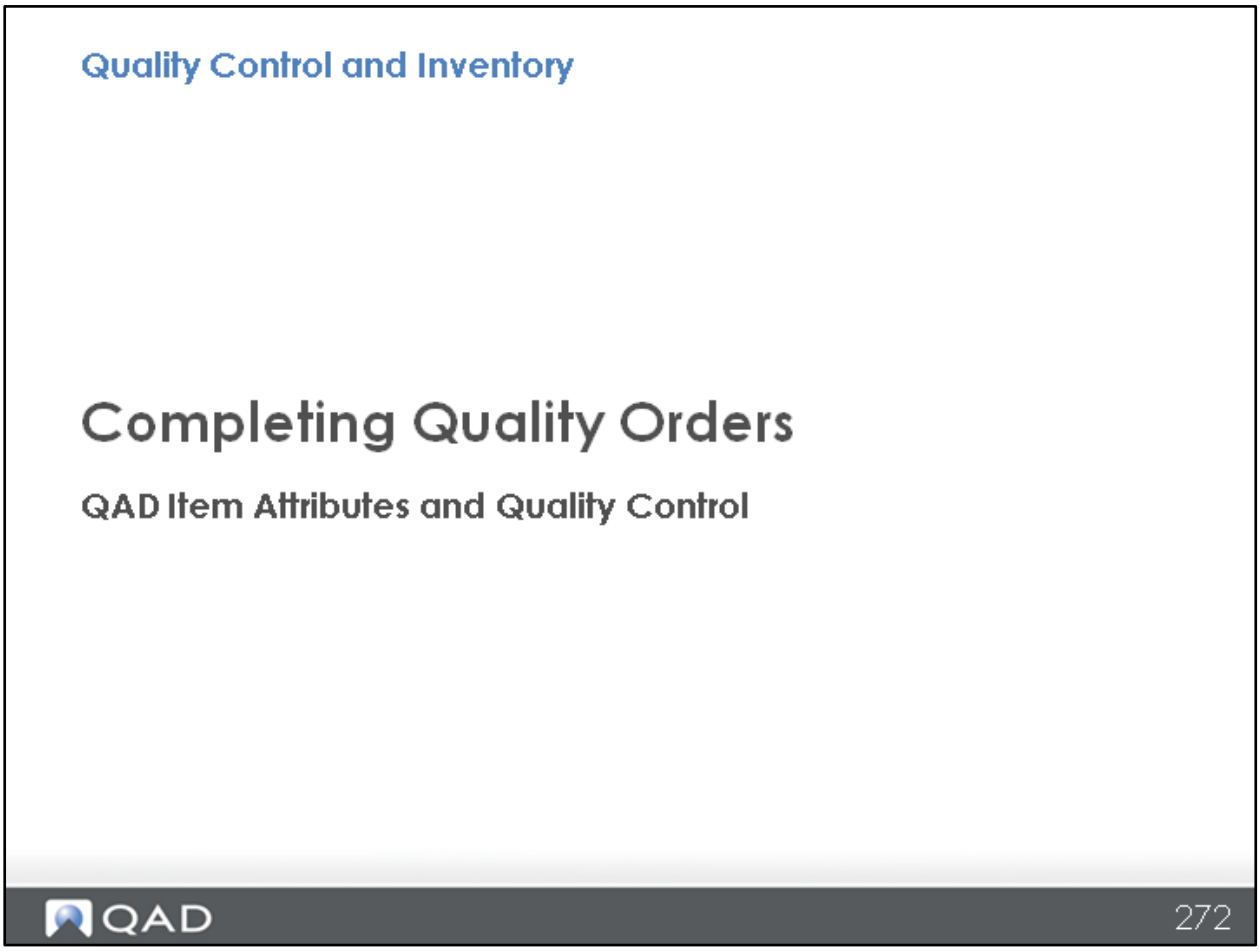
Create a Test Record



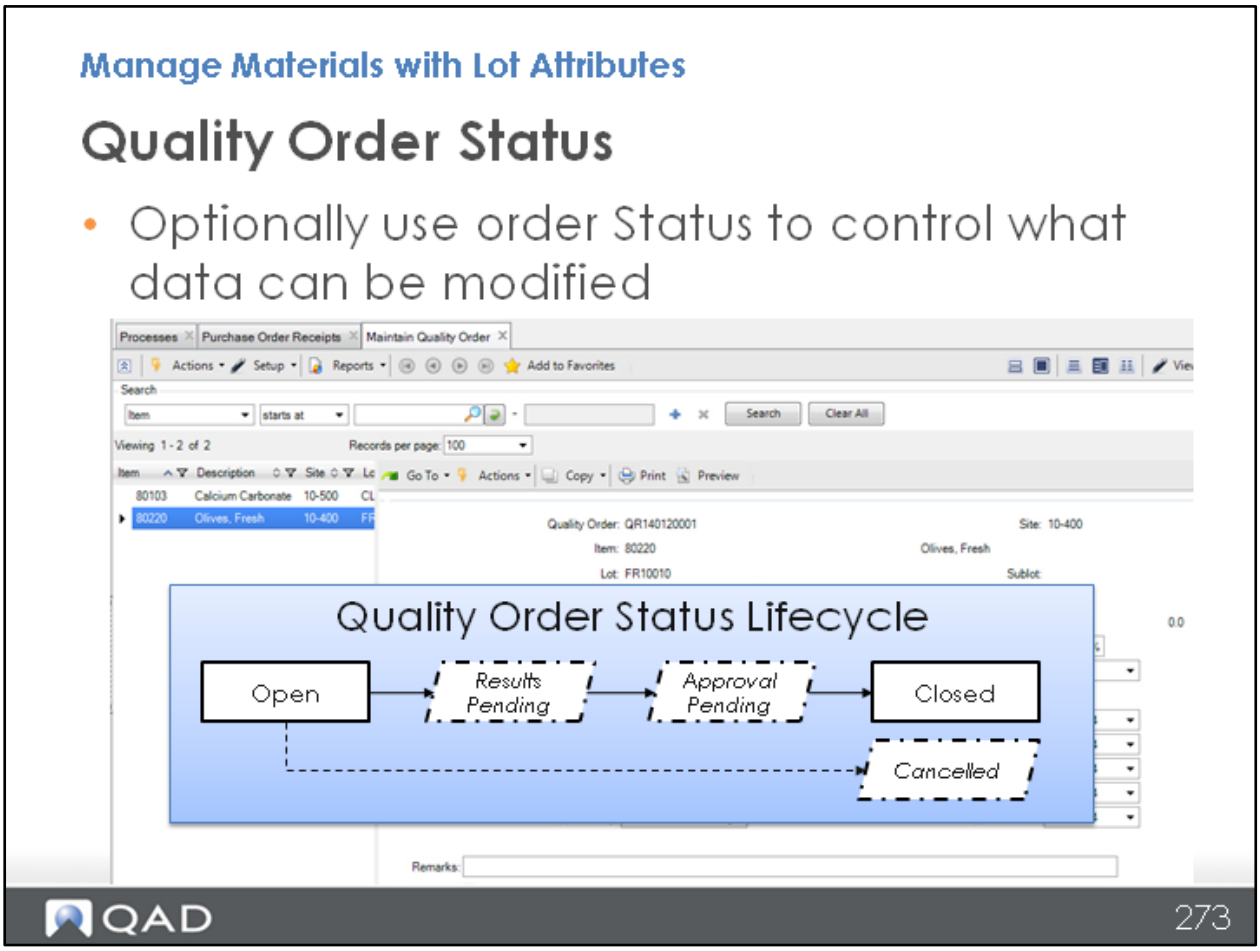
You can create test records manually using the Create button in the second level Quality Order Test Records tab.

Create a test record when more than one test record is required for a test specification or when a test is required for a test specification is not linked to the item.

Completing Quality Orders



Quality Order Status

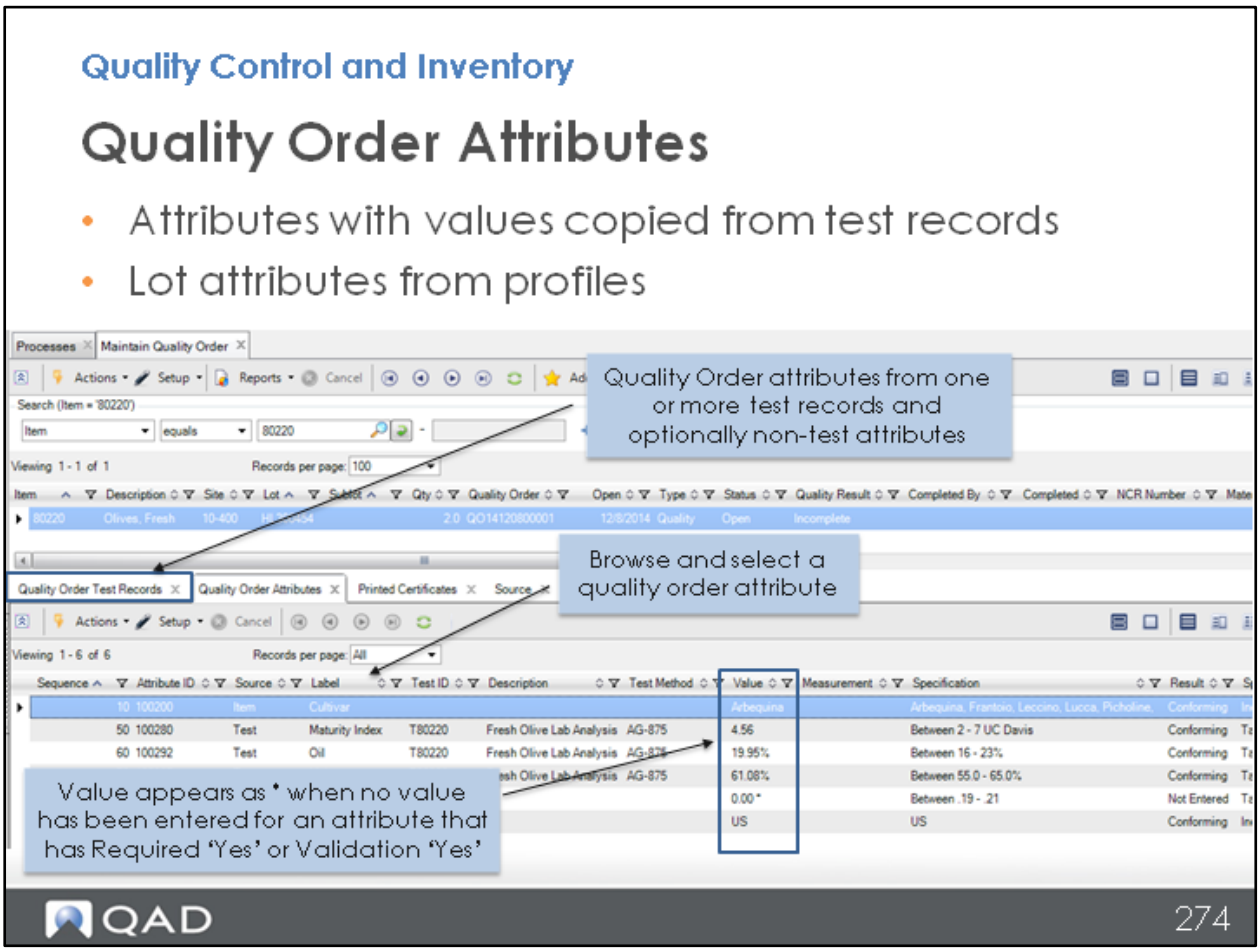


Each quality order has an Order Status which determines its position in the workflow. The following statuses are available:

- **Open**. The default status when the order is created. When the status is Open, subsequent receipts for the same item and lot will increment the order quantity for the Quality Order. The status can be changed from Open to Results Pending, Approval Pending, Closed, or Cancelled.
- **Results Pending**. You can optionally change the status to Results Pending when the entire lot quantity has been received. When the status is Results Pending, the Order Quantity is not automatically updated by subsequent receipts for the item and lot.
- **Approval Pending.** You can optionally change the status to Approval Pending after the order results and the attribute values and results for the lot attribute order have been recorded. When the status is Approval Pending, its test records cannot be modified, the quality order attribute values cannot be modified, and the Order Quantity is not automatically updated by subsequent receipts for the item and lot.
- **Cancelled**. Change the status to Cancelled when the quality order is not required and will not be completed. Once cancelled, an order cannot be re-opened.

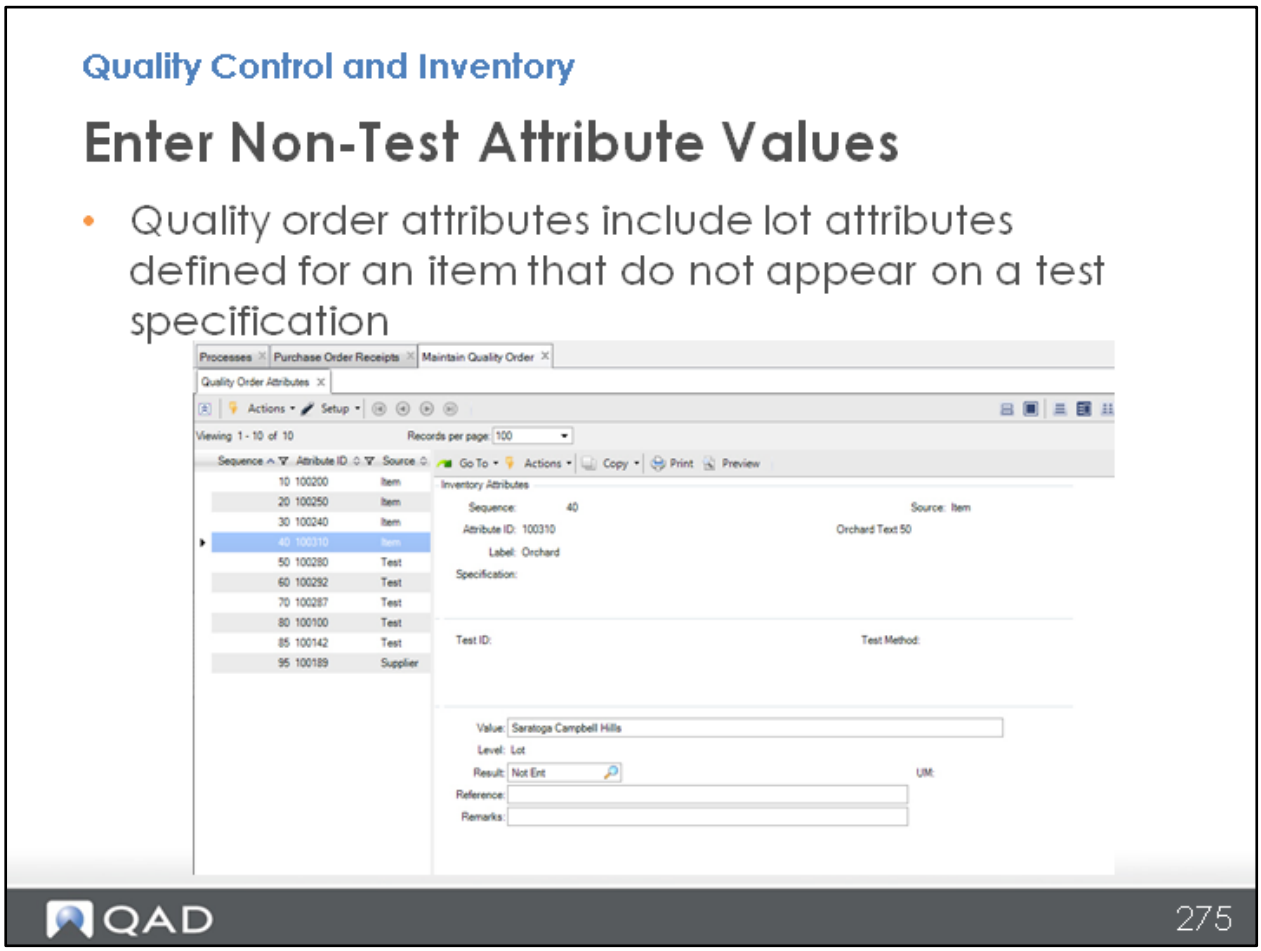
- **Closed**. Change the status to Closed when the order results and its attribute results are final. When the status is changed to Closed, transactions are processed to scrap the quantity destroyed, transfer the quantity retained, and optionally transfer the remaining quantity or update its inventory status. You cannot set closed orders to any other status and you cannot edit the values in their fields.
- **Closed Edit Pending.** The status that is assigned by the system when an administrator edits a closed order using the Edit Closed Quality Order function. Using that function the status can then be changed back to Closed.

Quality Order Attributes



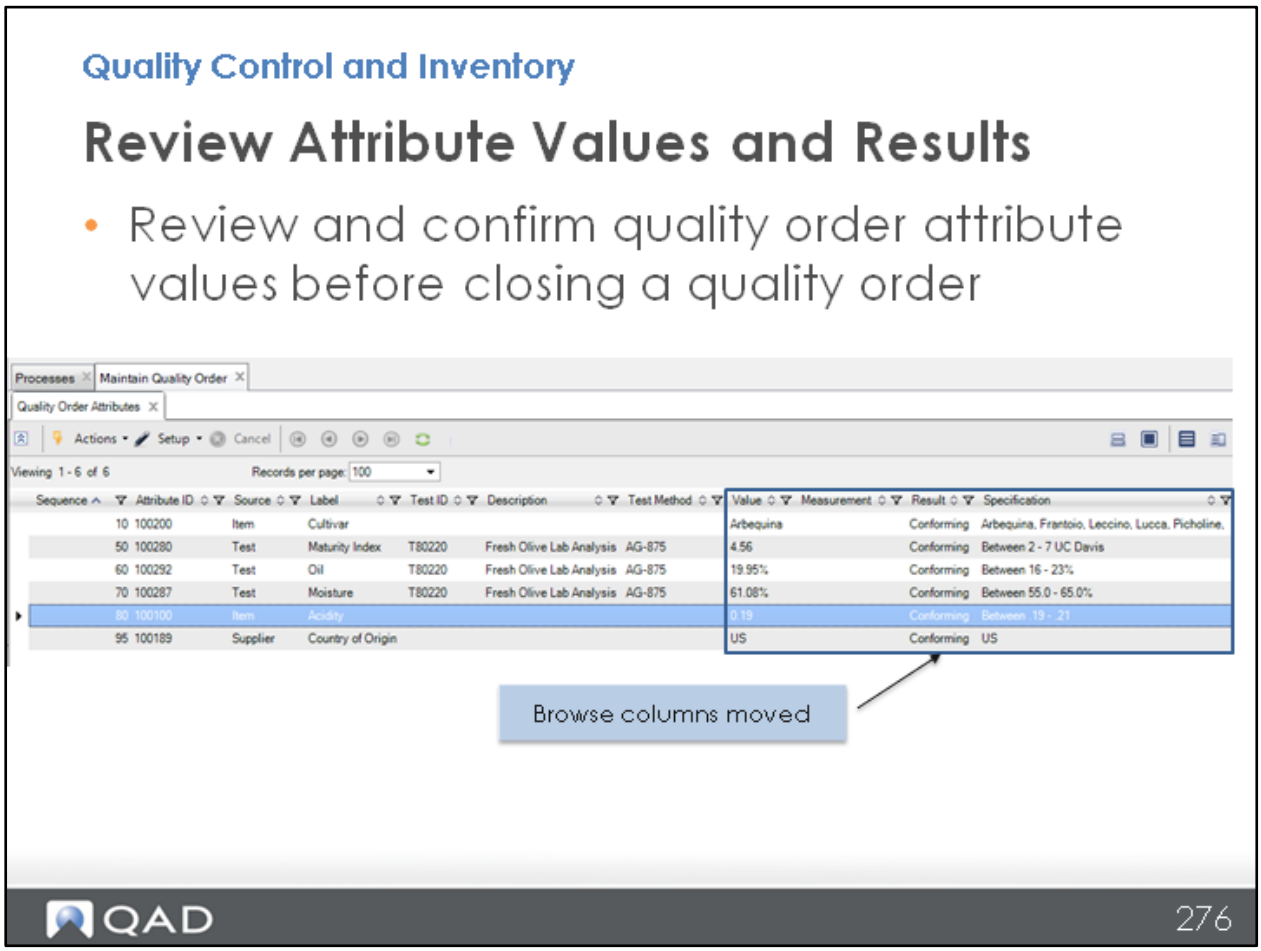
After entering all test attributes, review the remaining attributes to verify their accuracy.

Enter Non-Test Attribute Values



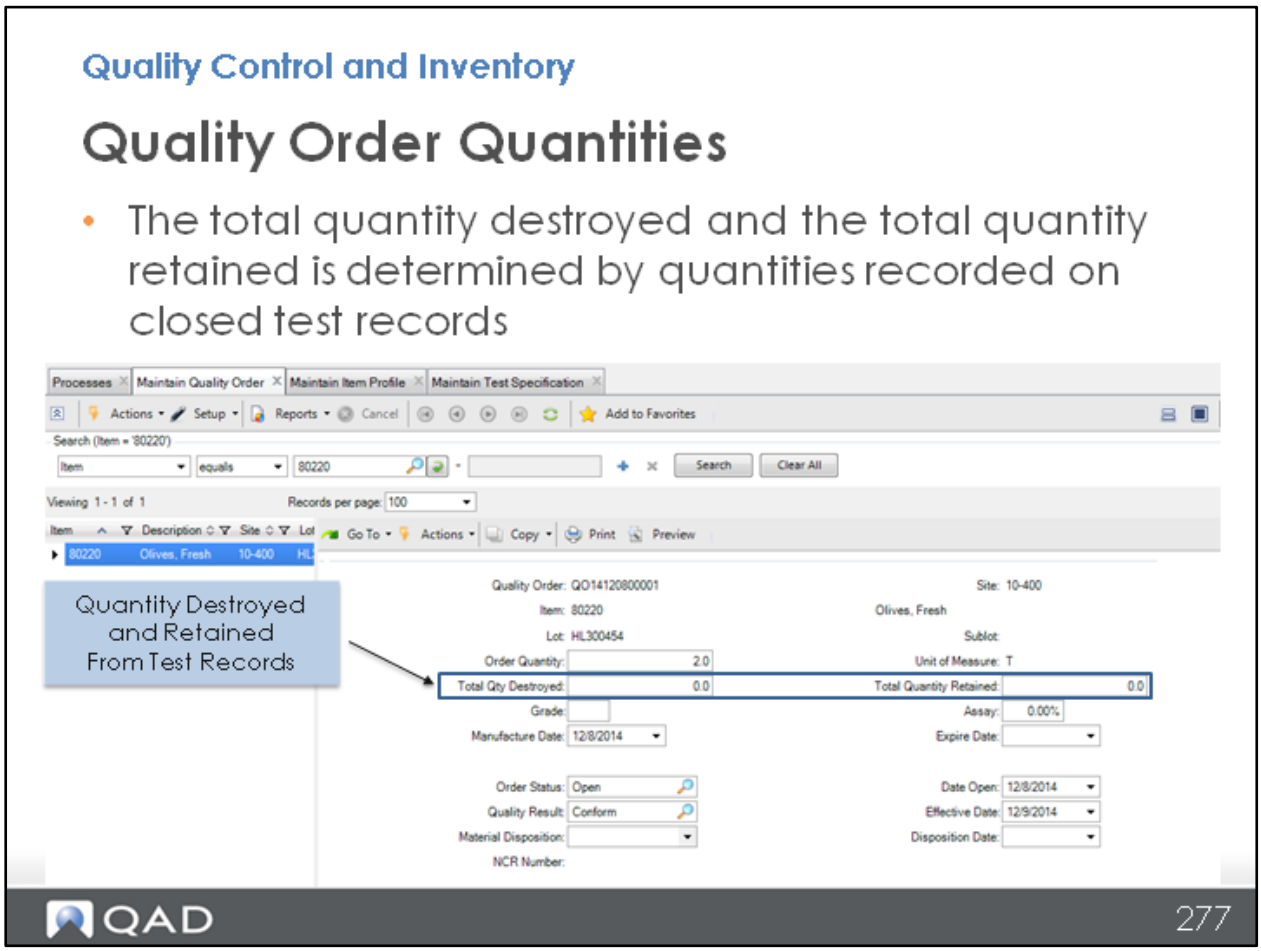
Enter non-test attributes manually. These are the attributes which do not have a source of Test. The method is the same as for entering Test attributes.

Review Attribute Values and Results



Observe that, in the above graphic, the result for Grower and Orchard are blank. This is because Validation for those attributes is set to No.

Quality Order Quantities

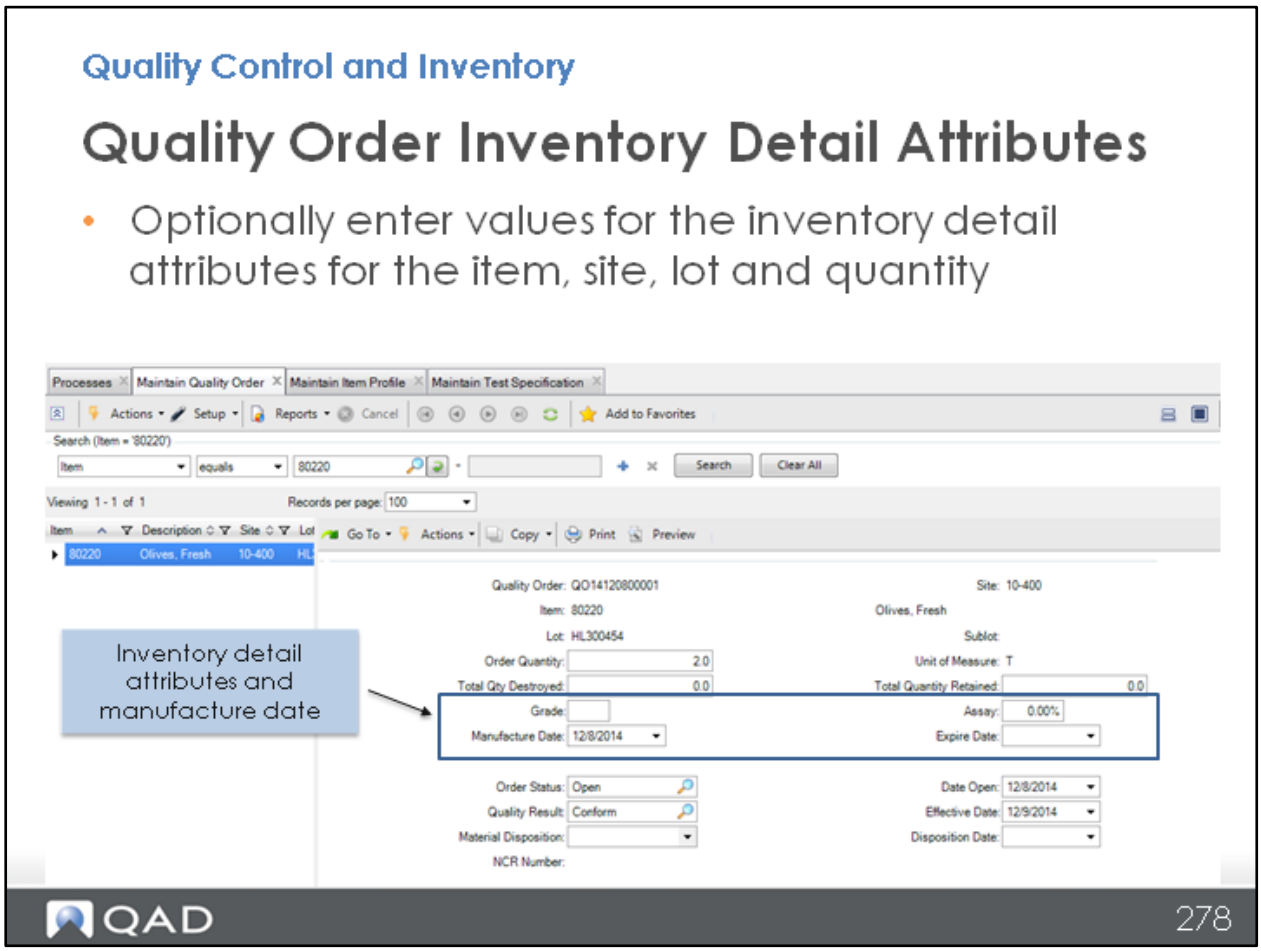


The quantities destroyed and retained are processed by inventory transactions after the quality order status is changed Closed.

Before closing the order, enter additional information as appropriate.

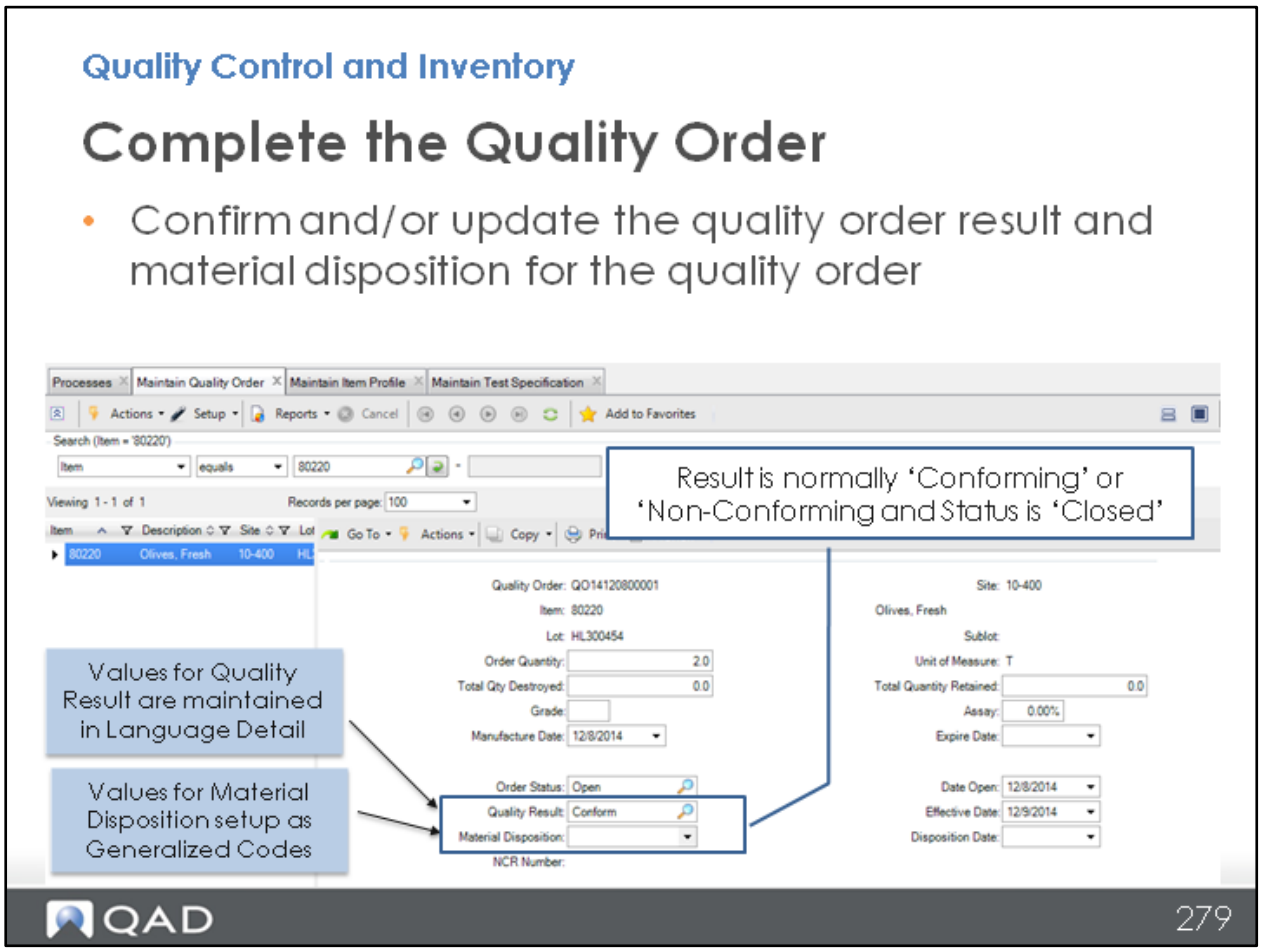
These attributes do not directly affect the quality control process, and your business needs will determine where they are necessary.

Quality Order Inventory Detail Attributes



Values for the inventory detail attributes for grade, assay, and expire date are updated after the quality order status is changed Closed.

Complete the Quality Order

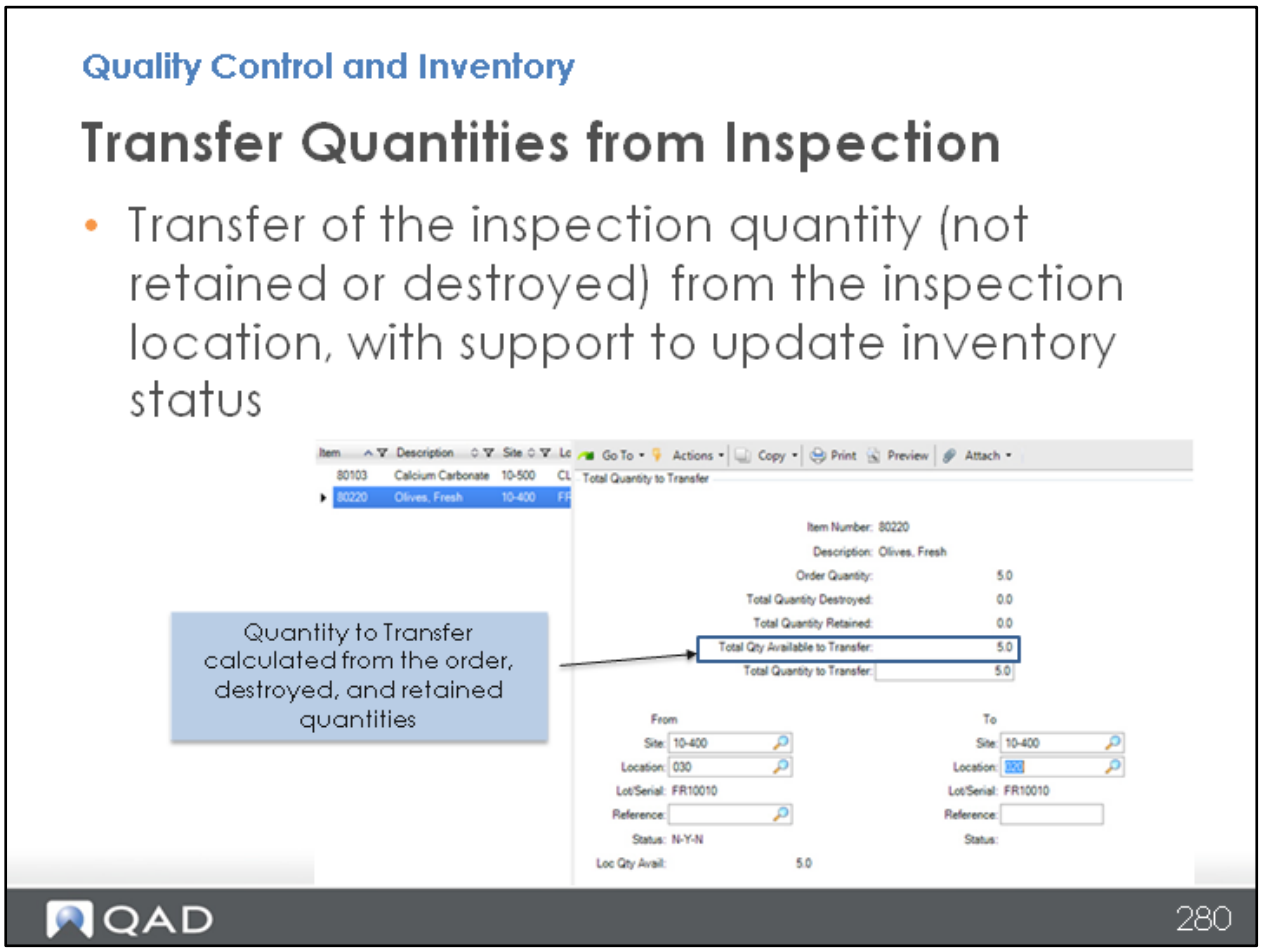


Before closing the order, enter additional information as appropriate. The result can also be set to 'No Data' or 'Inconclusive'.

To close a quality order, change the Order Status to Closed.

The status can also be set to 'Cancelled'.

Transfer Quantities from Inspection

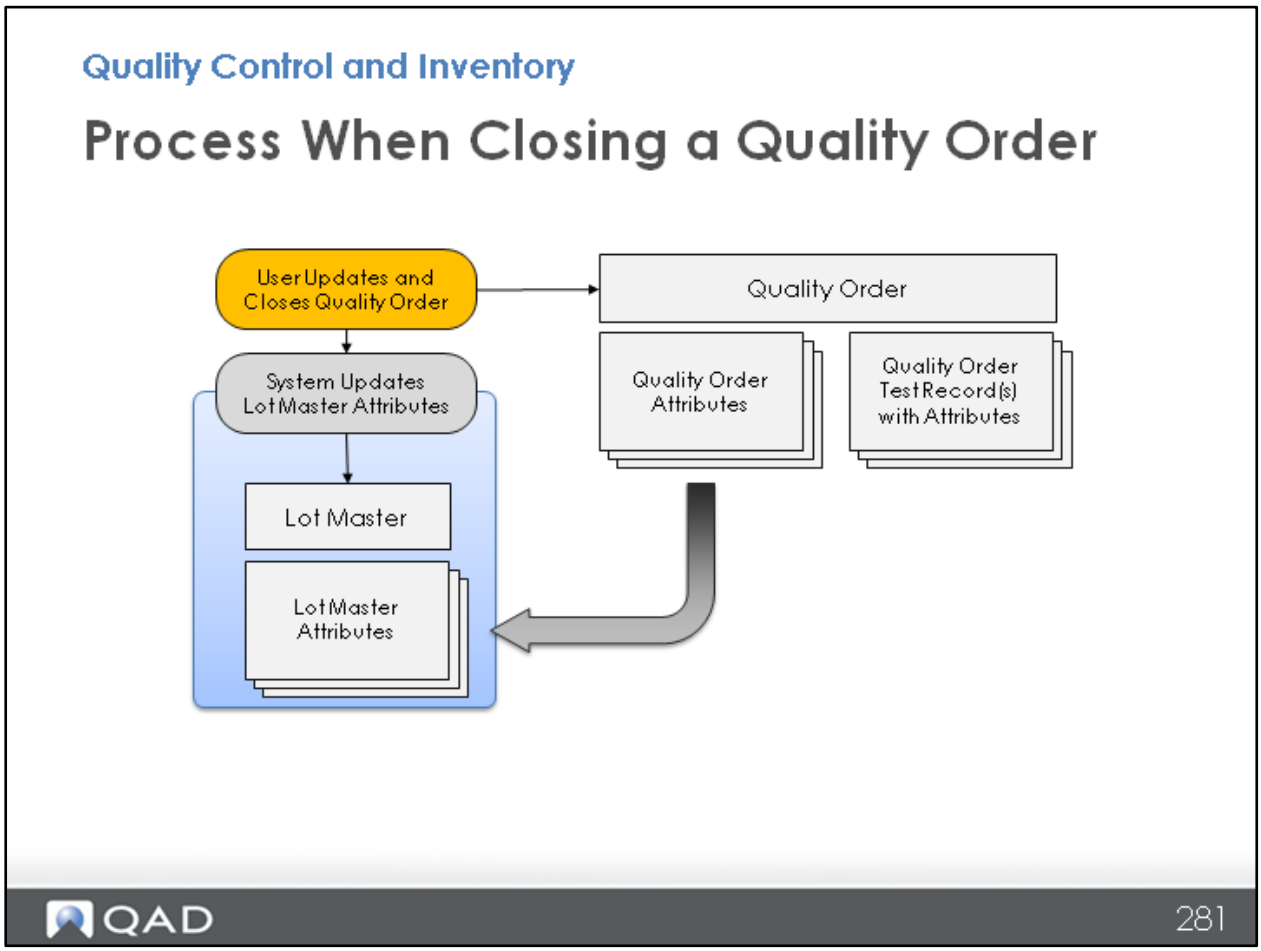


When closing a lot, you have the option to transfer material quantities and/or update the inventory status for the quantity remaining after inspection.

When processing the transfer of inventory, select the source and destination locations for the transfer transaction.

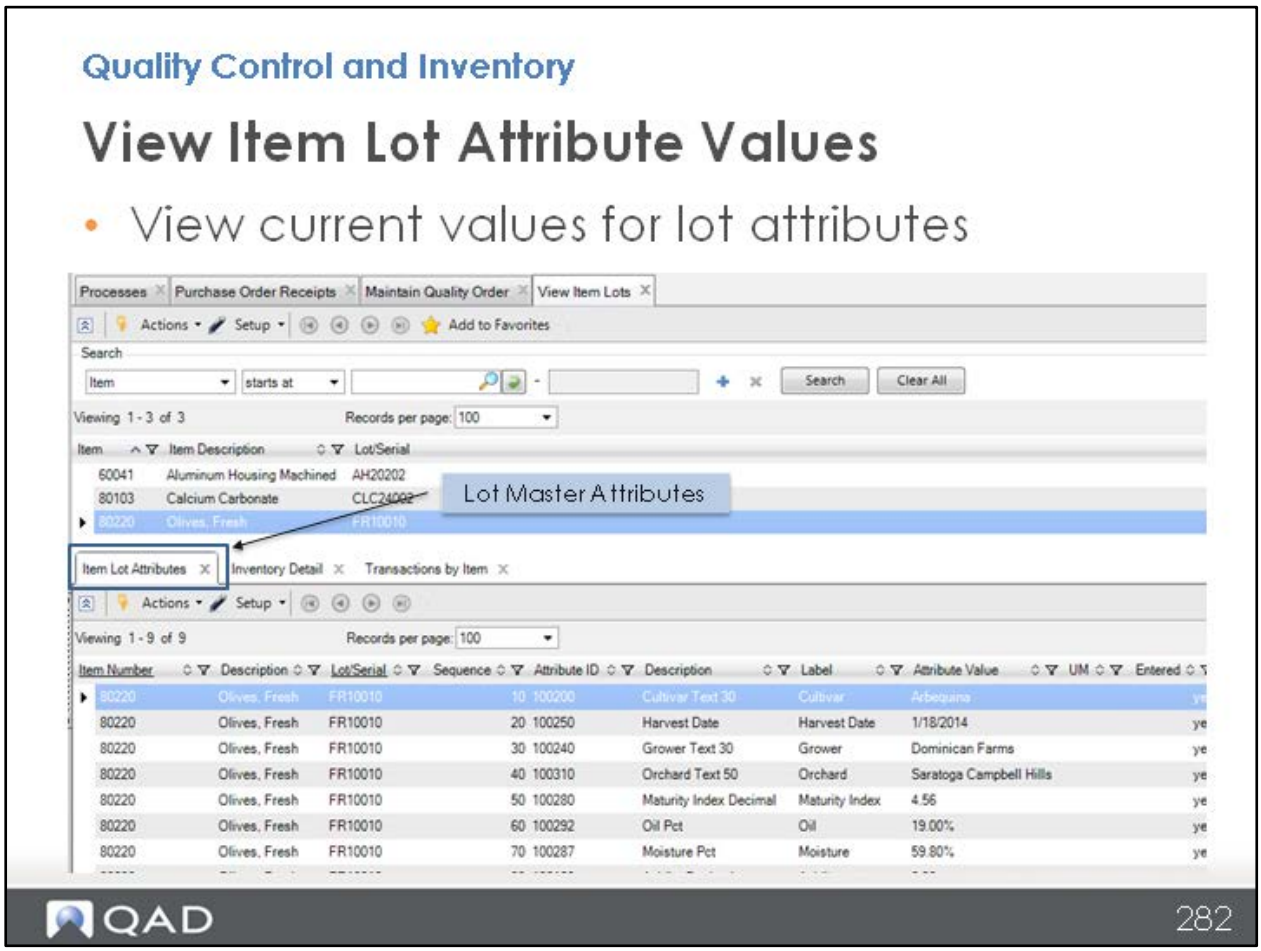
This transaction is preceded by a transaction to scrap the total quantity destroyed and a transaction to transfer the total quantity retained.

Process When Closing a Quality Order



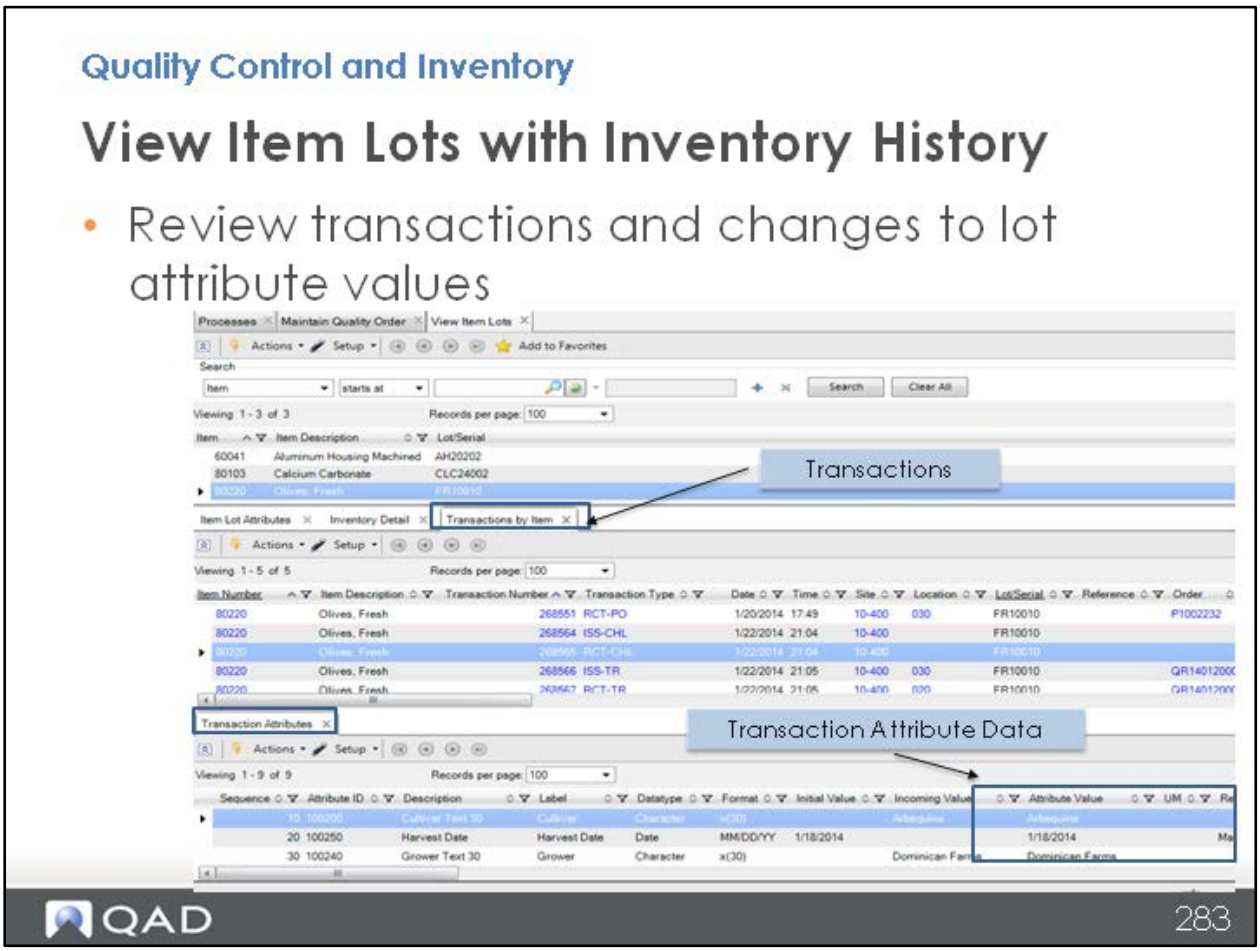
After closing a quality order, if the test's results are Conforming or Non-Conforming, you can update the lot master attributes with the values of the quality order attributes. If the test's results are Cancelled, No Data, or Inconclusive, or if the test record is deleted, then the attributes do not update.

View Item Lot Attribute Values



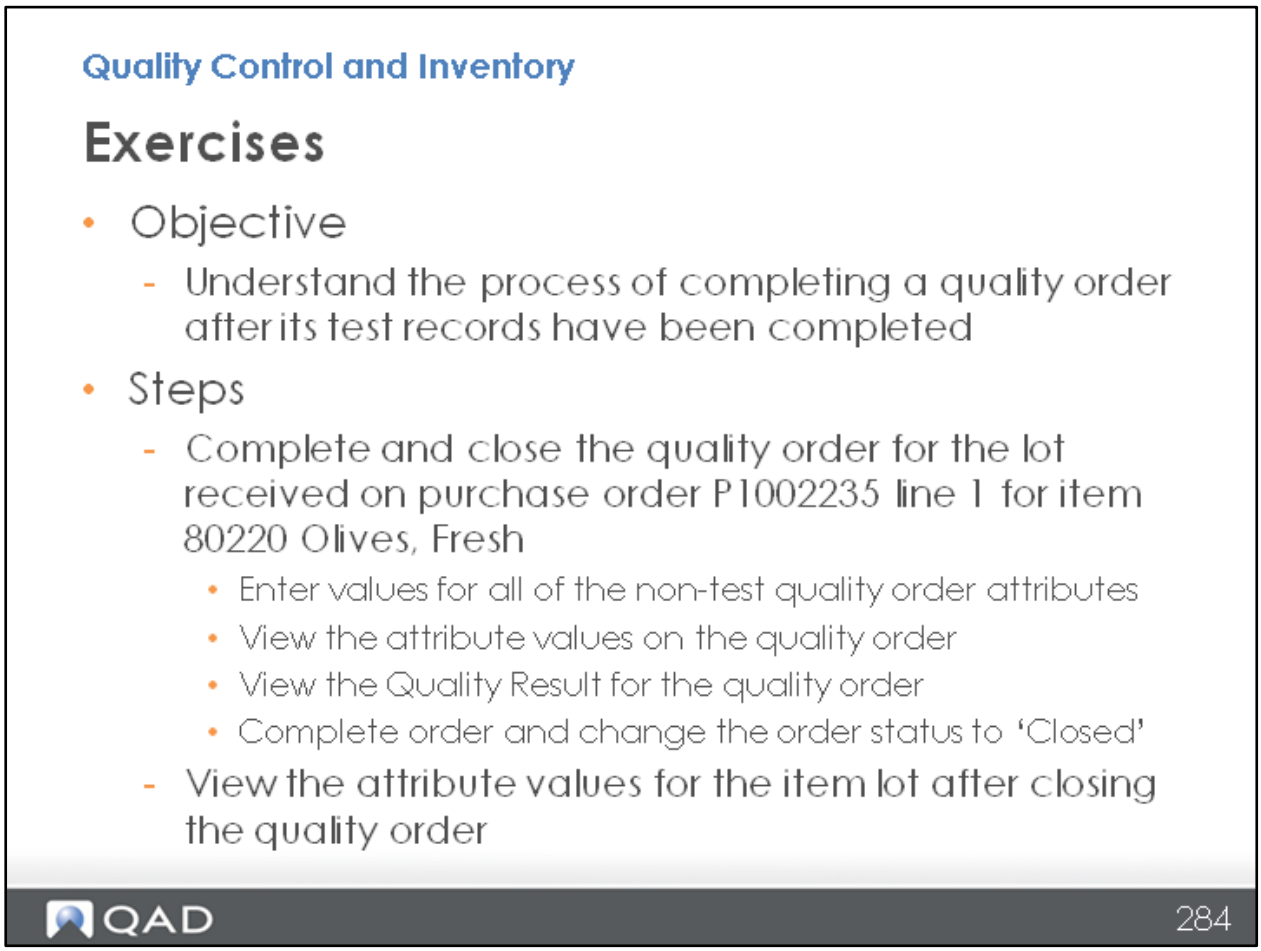
You can see the results of this process in the View Item Lots browse collection. Access lot attributes in the second level Item Lot Attributes tab.

View Item Lots with Inventory History



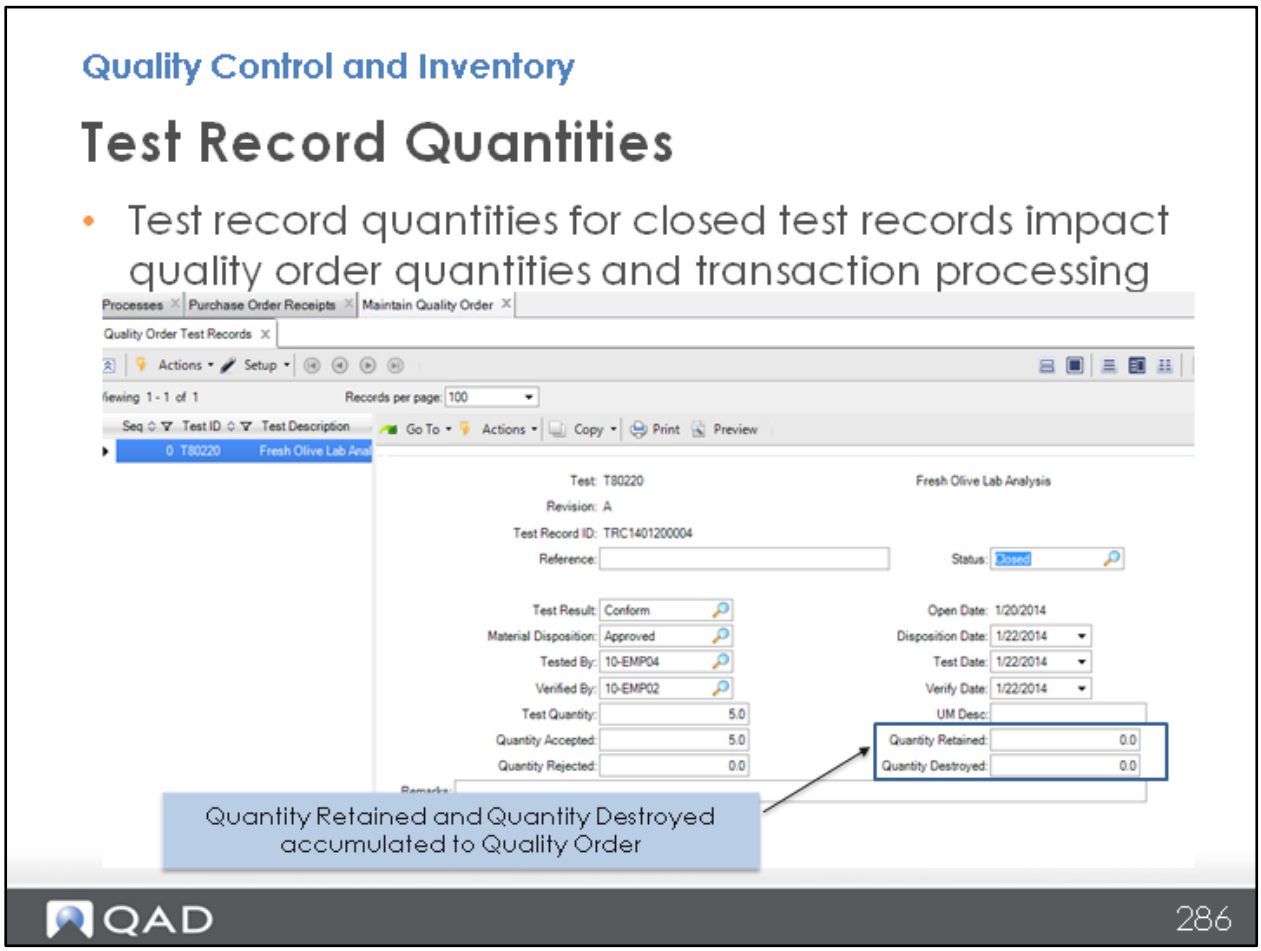
In the second level Transactions by Item tab, the system displays the history of transactions which edited attribute data. This includes quality orders which updated the quality item lot.

Exercises


Quality Control and Inventory
Exercises
Objective
Understand the process of completing a quality order after its test records have been completed
Steps
Complete and close the quality order for the lot received on purchase order P1002235 line 1 for item 80220 Olives, Fresh
Enter values for all of the non-test quality order attributes
View the attribute values on the quality order
View the Quality Result for the quality order
Complete order and change the order status to 'Closed'
View the attribute values for the item lot after closing the quality order
QAD
284

Test Quantities Destroyed and Retained

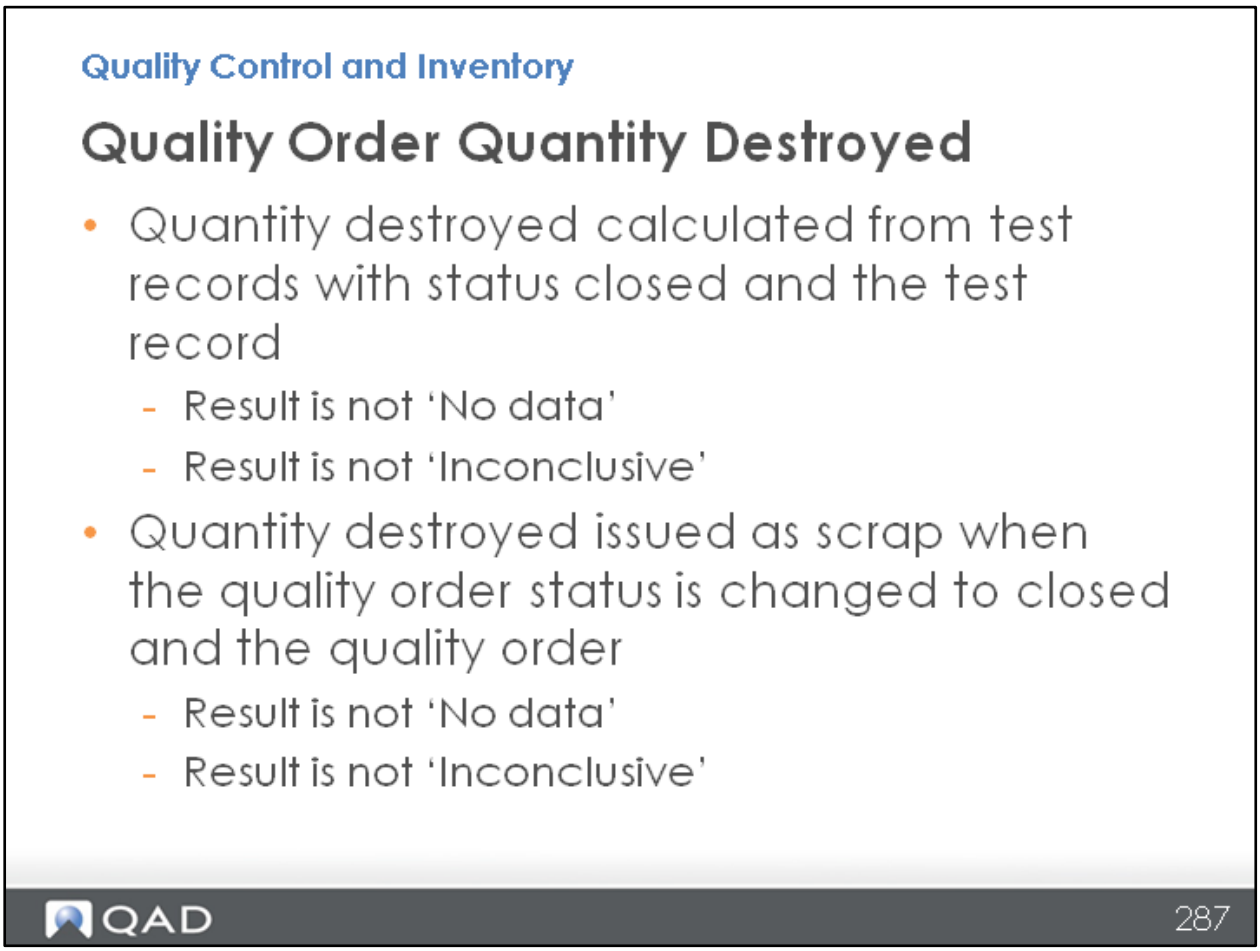
Test Record Quantities



Next, this guide demonstrates the impact of test record quantities on quality order quantities and inventory.

When closing a quality order, you can enter a Quantity Accepted and Quantity Rejected. These fields are for reference, to provide a record of test results.

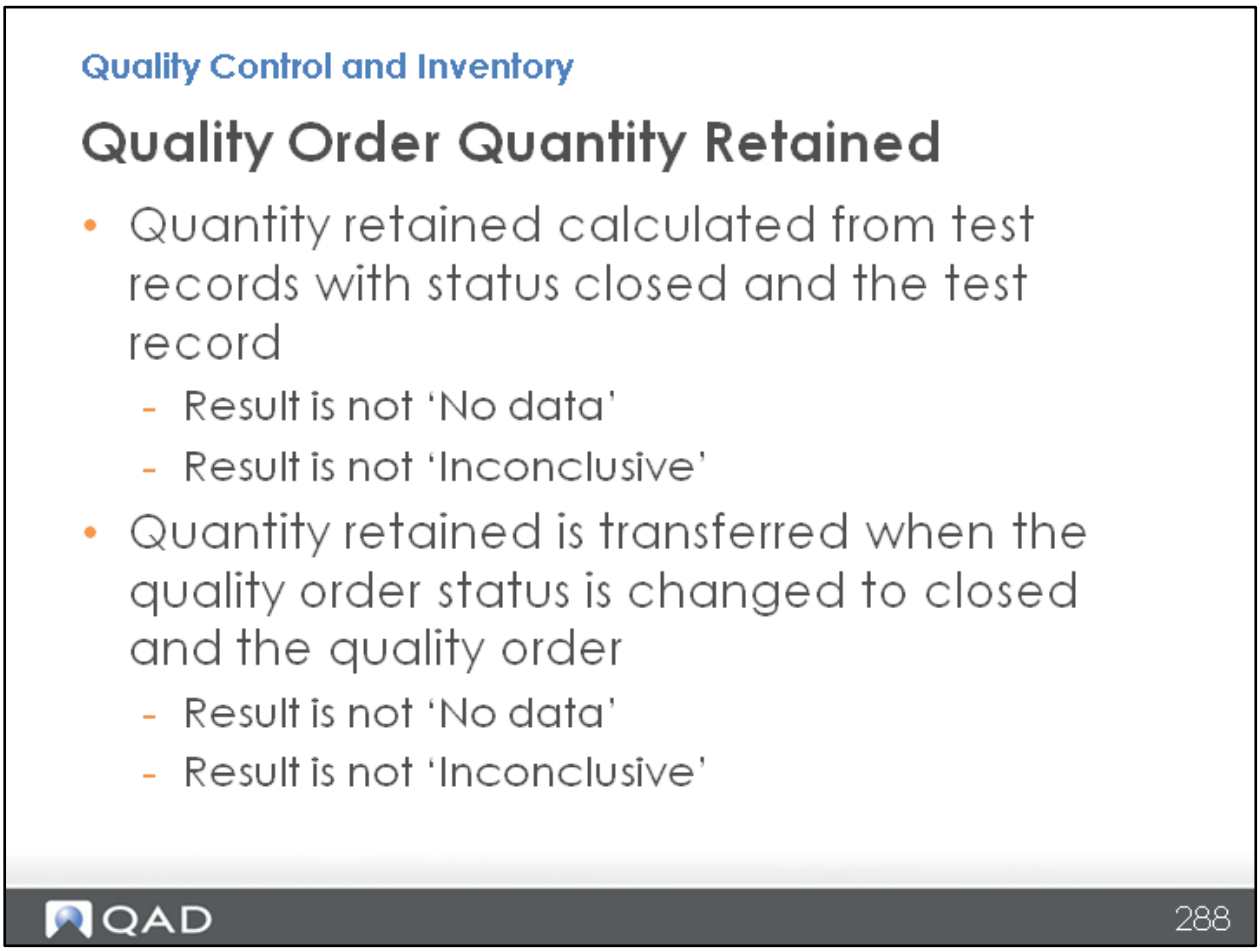
Quality Order Quantity Destroyed



The Quantity Destroyed is calculated for a test record when that test record is closed and its Result is not set to No Data or Inconclusive.

This quantity is subject to scrap when the quality order is closed and its result is not set to No Data or Inconclusive.

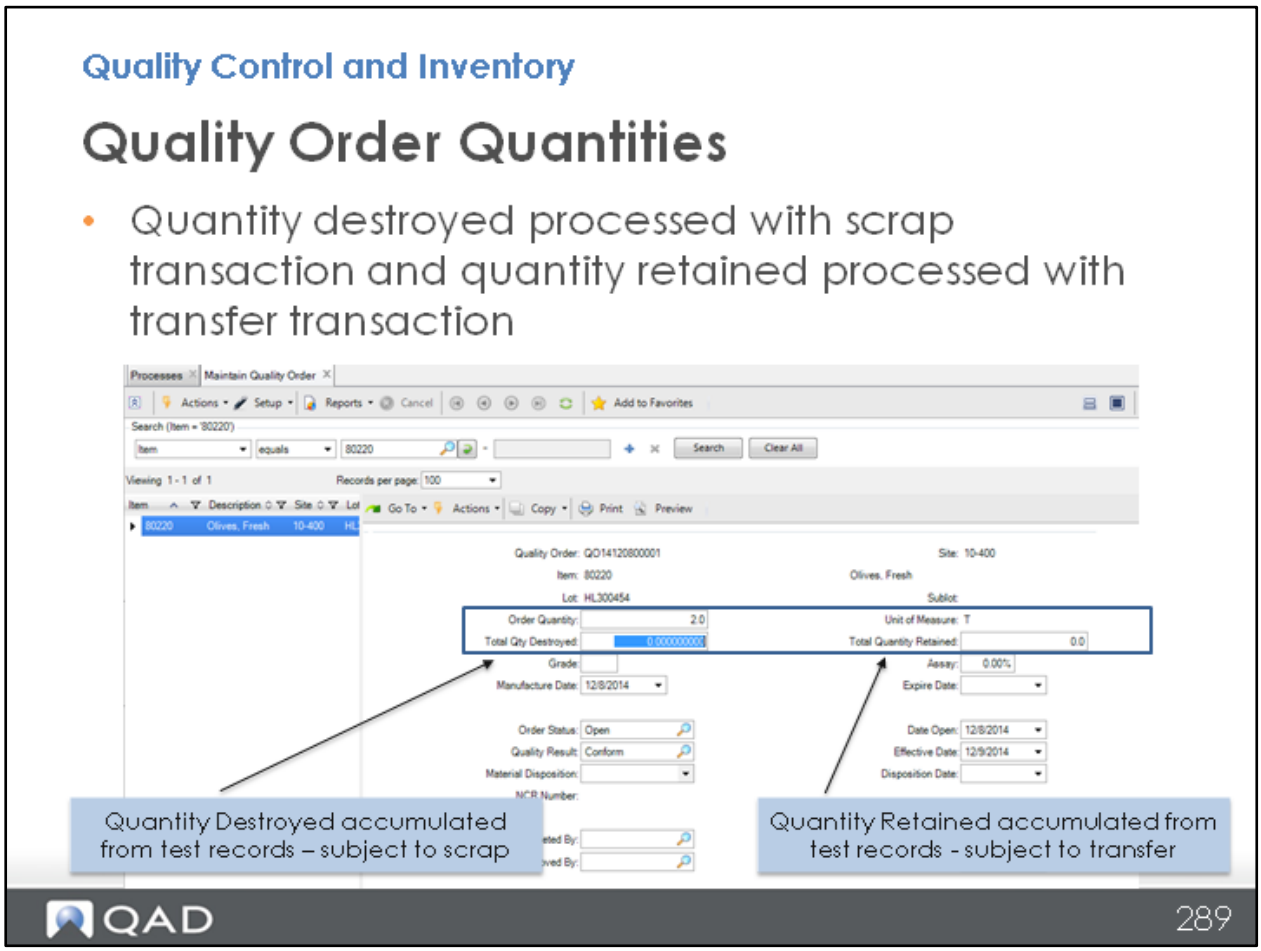
Quality Order Quantity Retained



The Quantity Retained is calculated for a test record when that test record is closed and its Result is not set to No Data or Inconclusive.

This quantity is subject to transfer when the quality order is closed and its result is not set to No Data or Inconclusive.

Quality Order Quantities

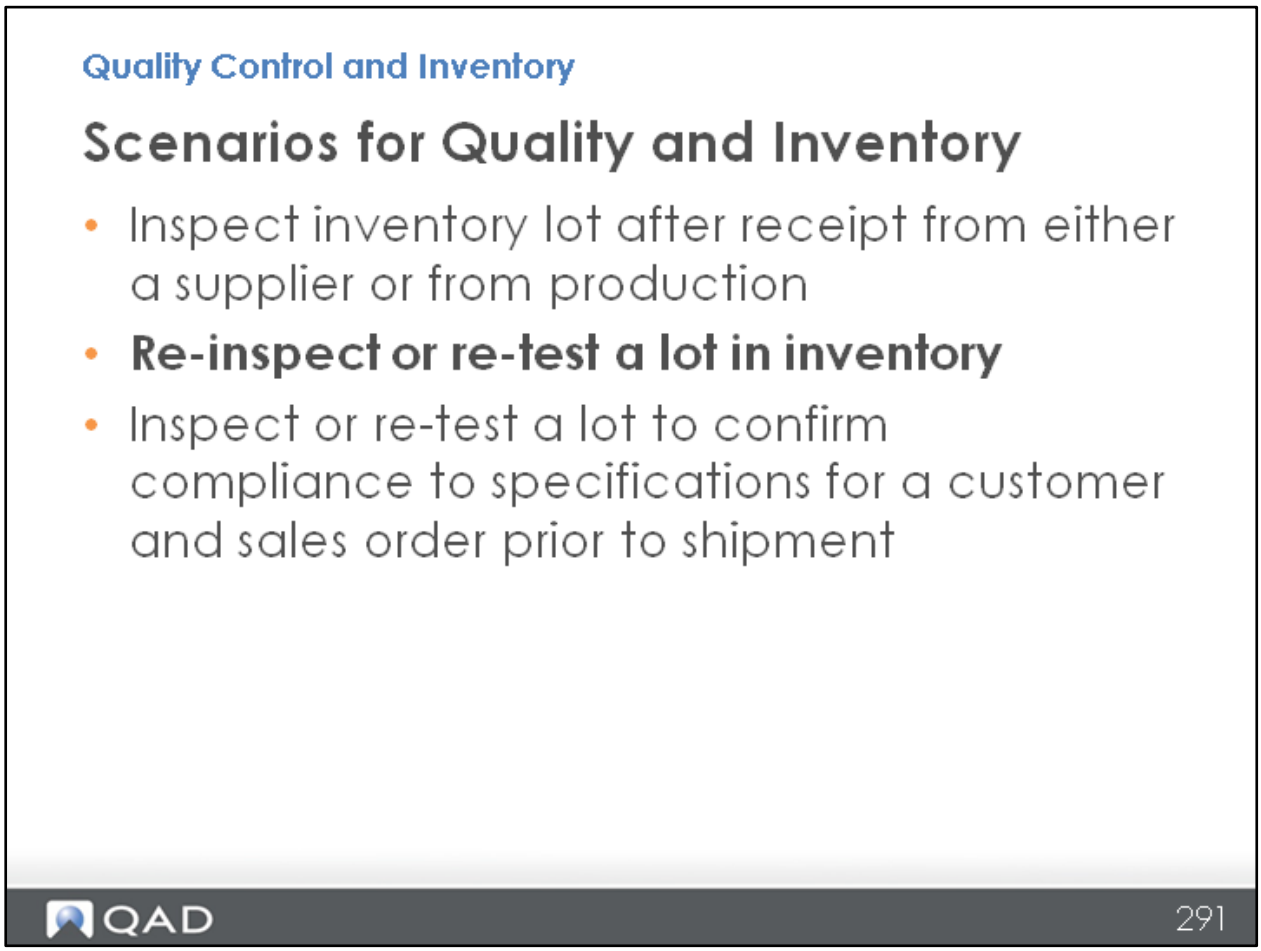


The quantity of items which are destroyed require a scrap transaction.

The quantity of items which are retained require a transfer transaction.

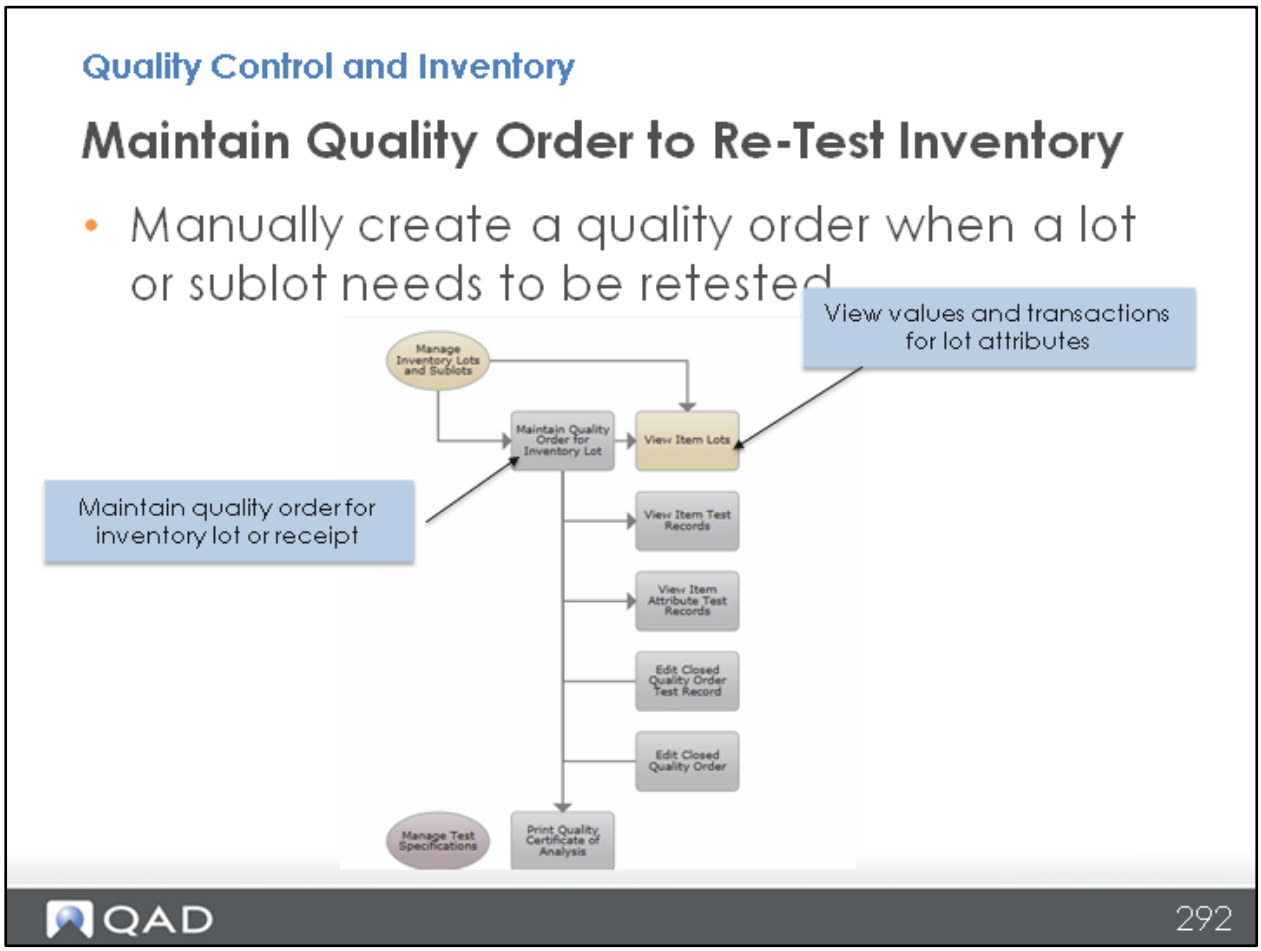
Retesting with Quality Orders

Scenarios for Quality and Inventory



Next, this guide covers the creation of a quality order for the re-inspection of a lot in inventory.

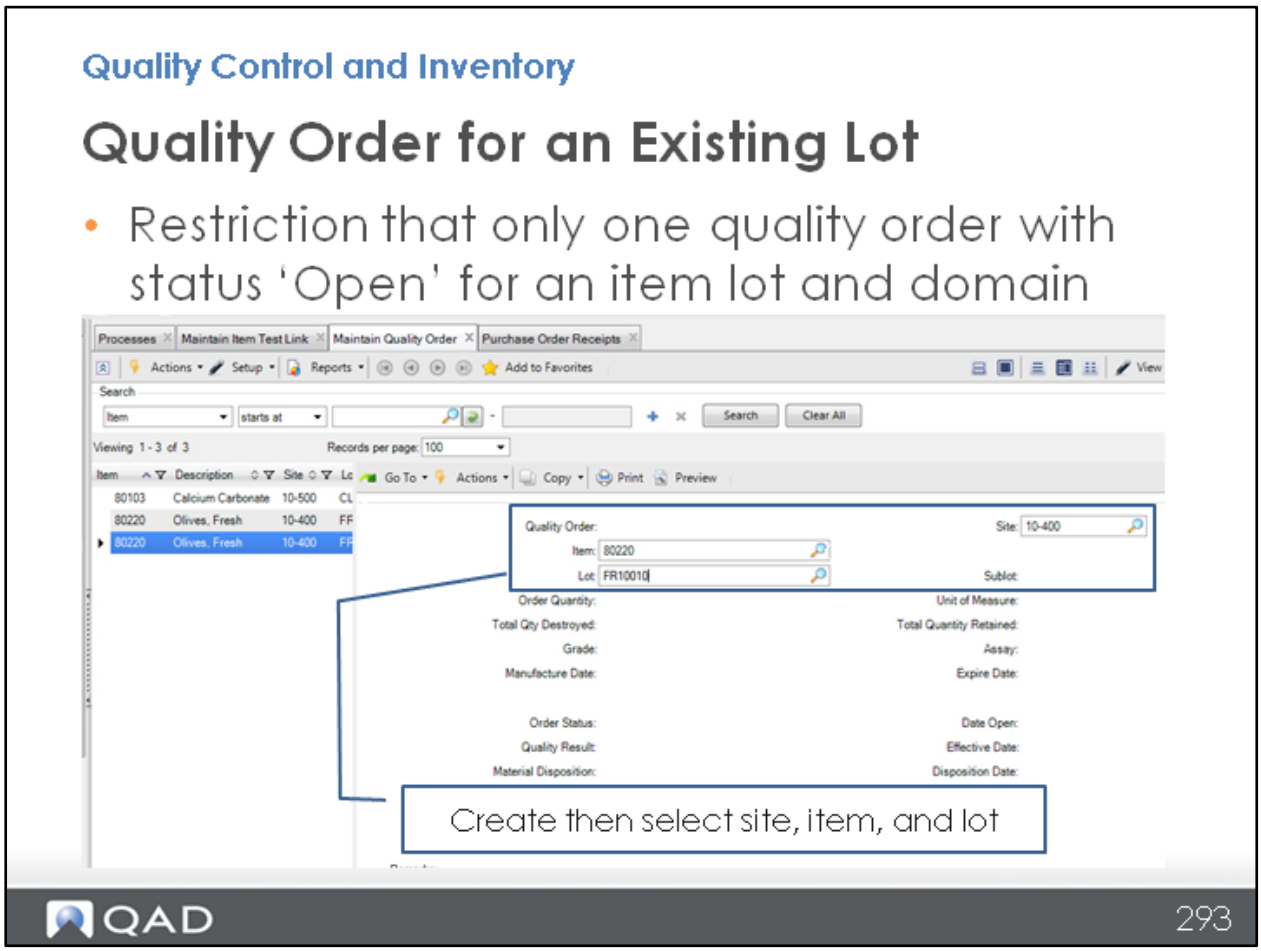
Maintain Quality Order to Re-Test Inventory



Access the tools for inventory inspection within the process maps here:

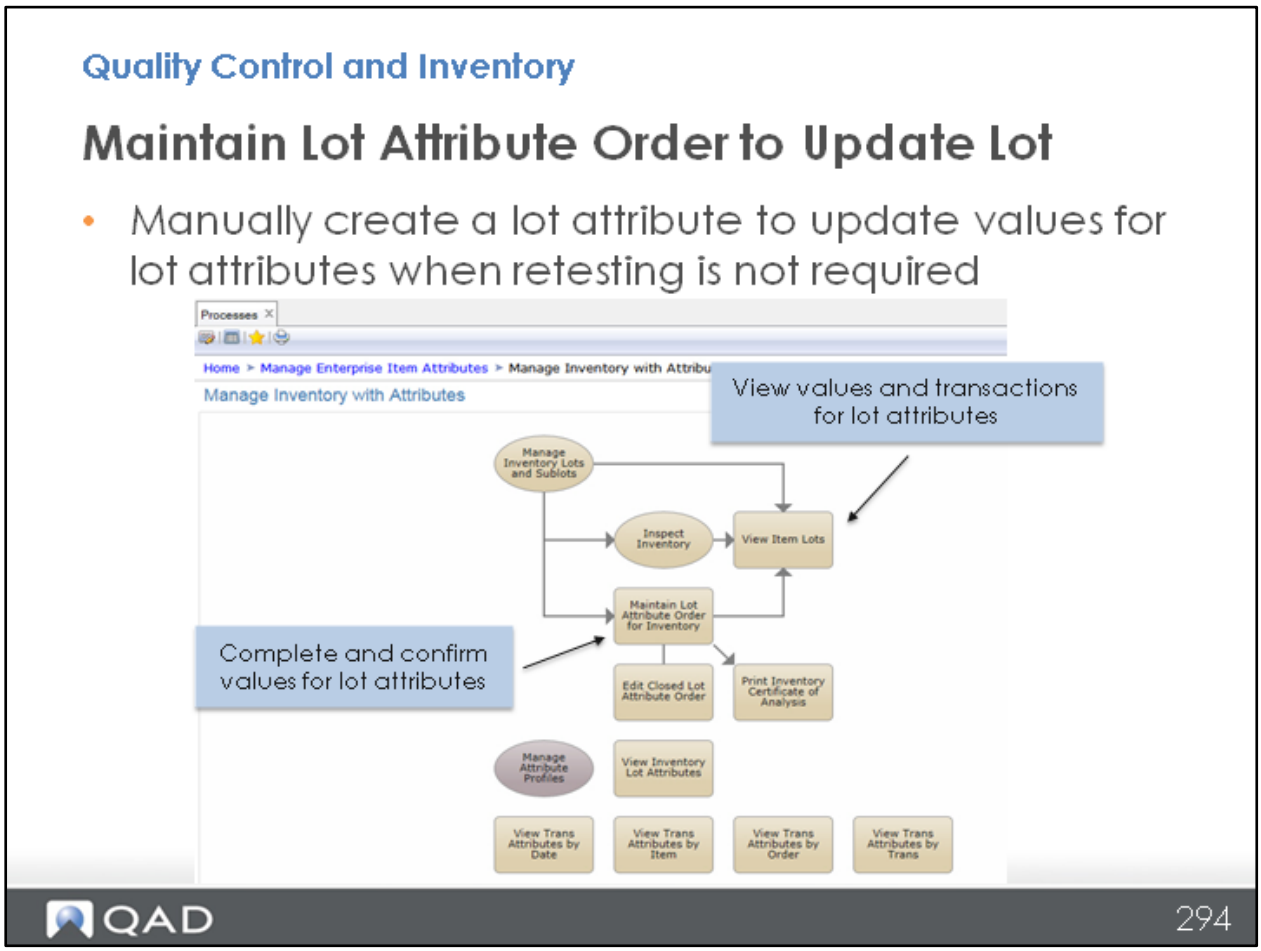
Home > Manage Enterprise Item Attributes > Manage Inventory with Attributes > Inspect Inventory

Quality Order for an Existing Lot



Create a the quality order for the re-inspection through the Maintain Quality Order browse collection. Select the Item, Site, and Lot matching the lot which you intend to re-inspect. This creates a new quality order for that lot and all quantities for that lot, across all inventory locations.

Maintain Lot Attribute Order to Update Lot



Access the tools to update lots within the process maps here:

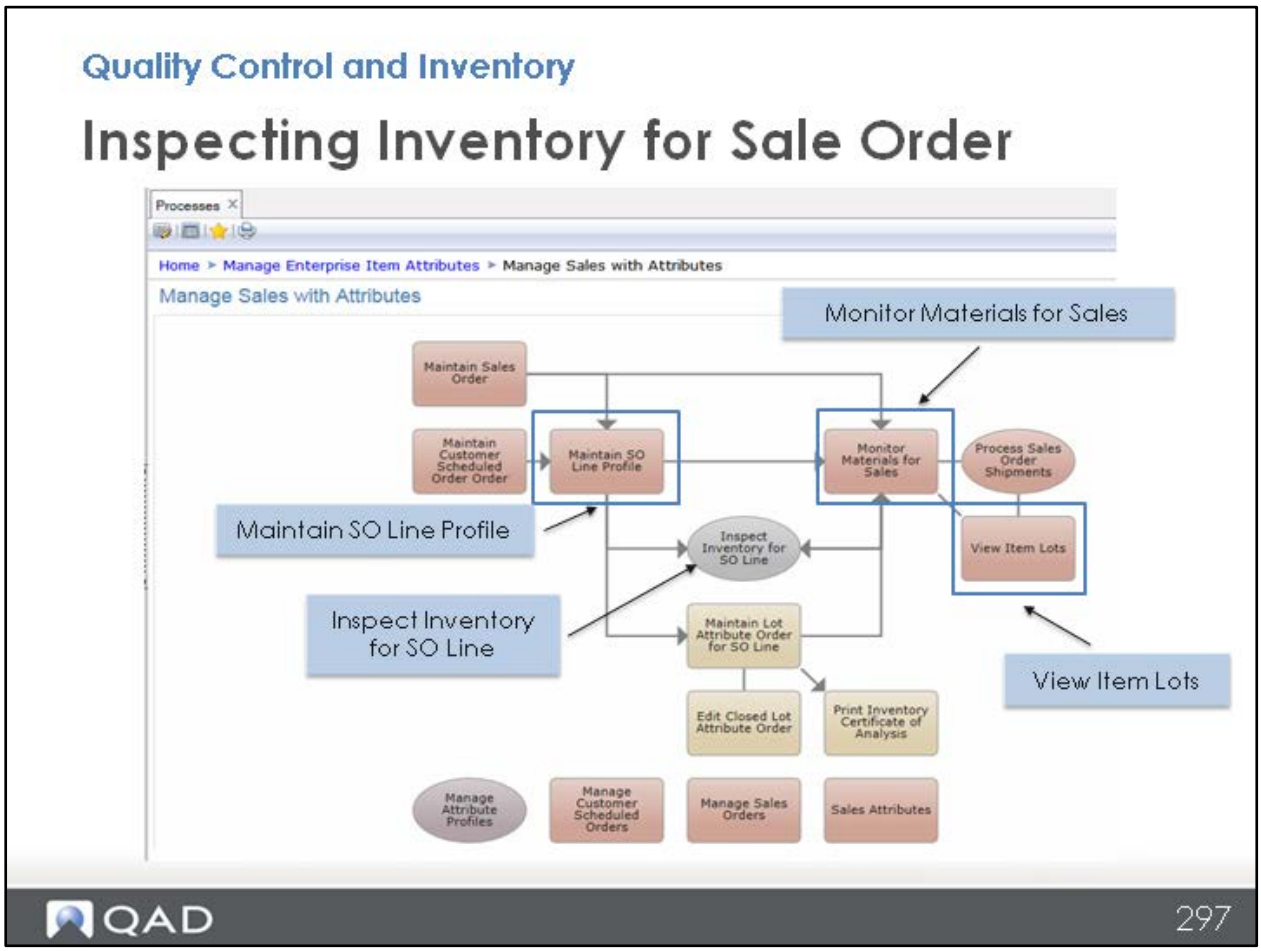
Home > Manage Enterprise Item Attributes > Manage Inventory with Attributes

Testing for Compliance to Sales Order

Scenarios for Quality and Inventory

Finally, this guide discusses the quality control scenario for testing lots prior to sales.

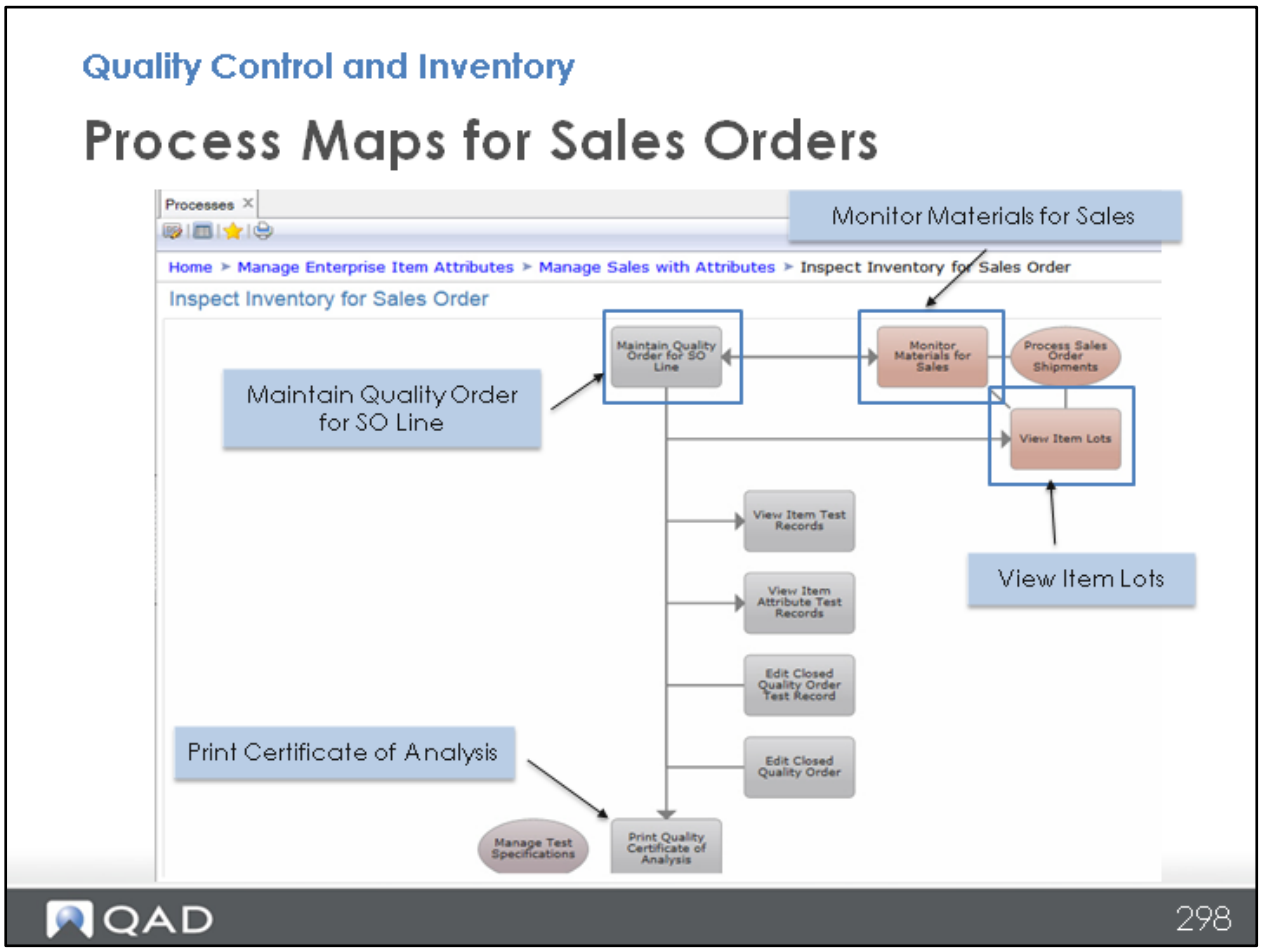
Inspecting Inventory for Sale Order



You can find the functions common to inspecting lots for sale within the process maps here:

Home > Manage Enterprise Item Attributes > Manage Sales with Attributes

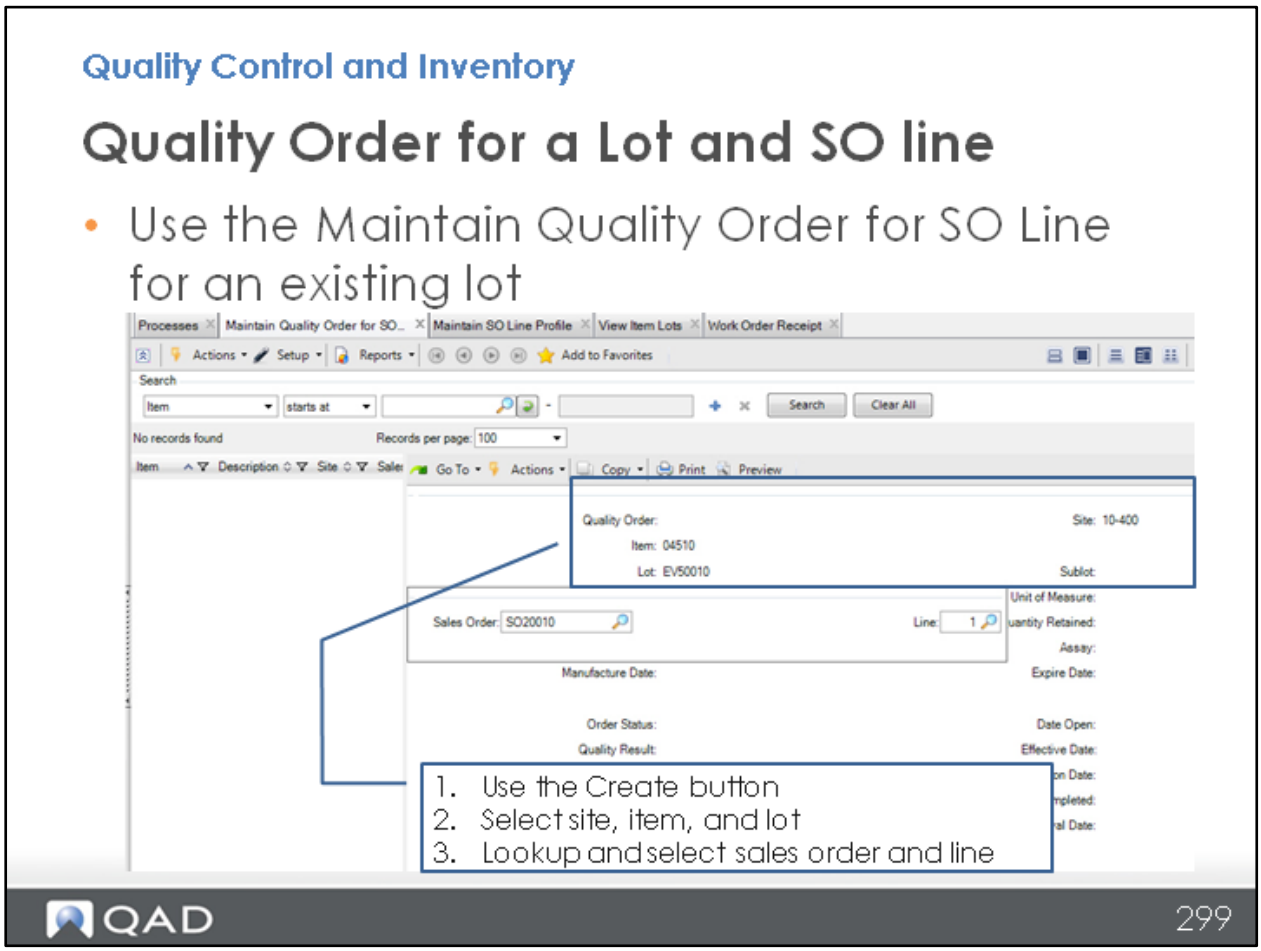
Process Maps for Sales Orders



You can find the functions more specifically geared toward Sales Orders within the process maps here:

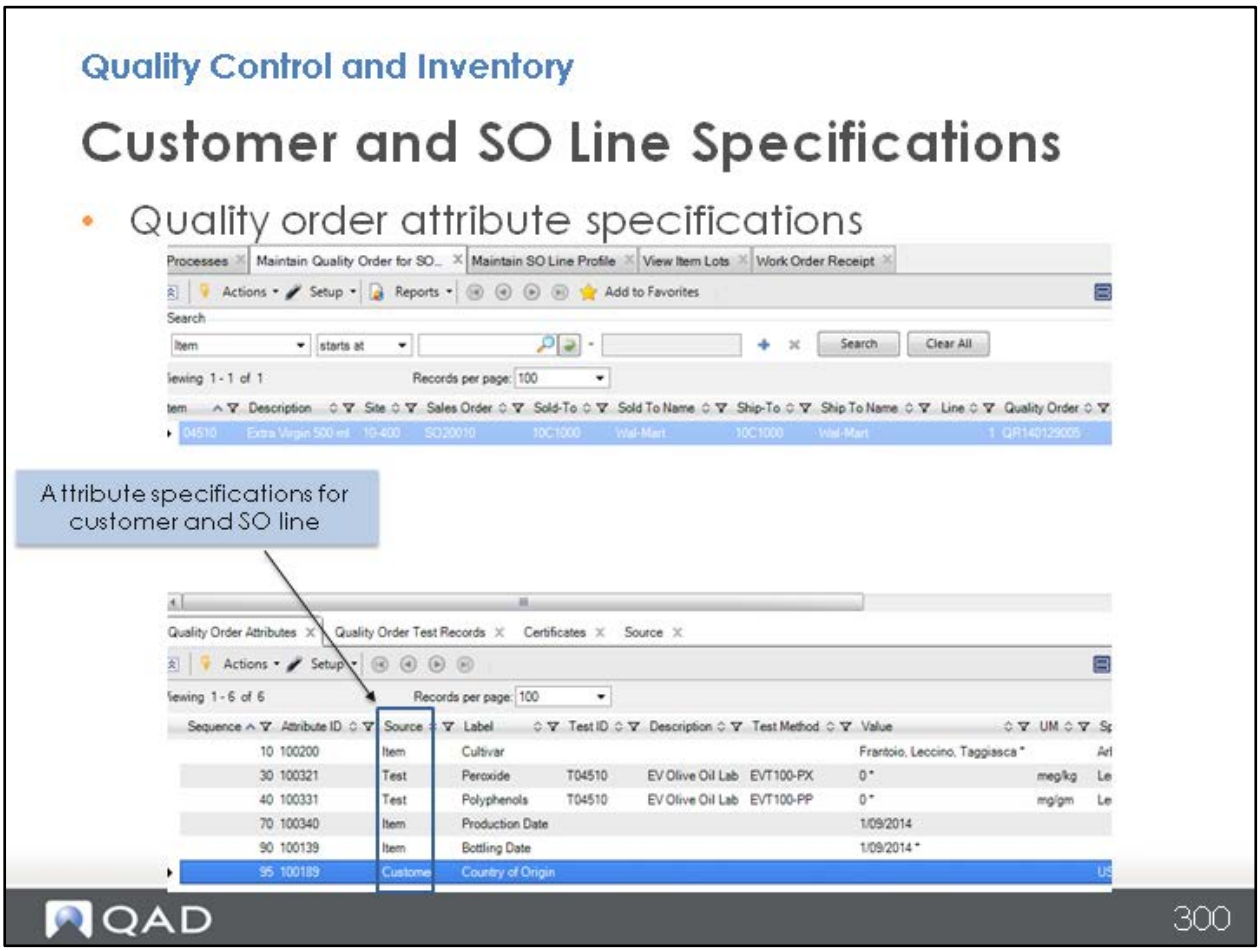
Home > Manage Enterprise Item Attributes > Manage Sales with Attributes > Inspect Inventory for Sales Order

Quality Order for a Lot and SO line



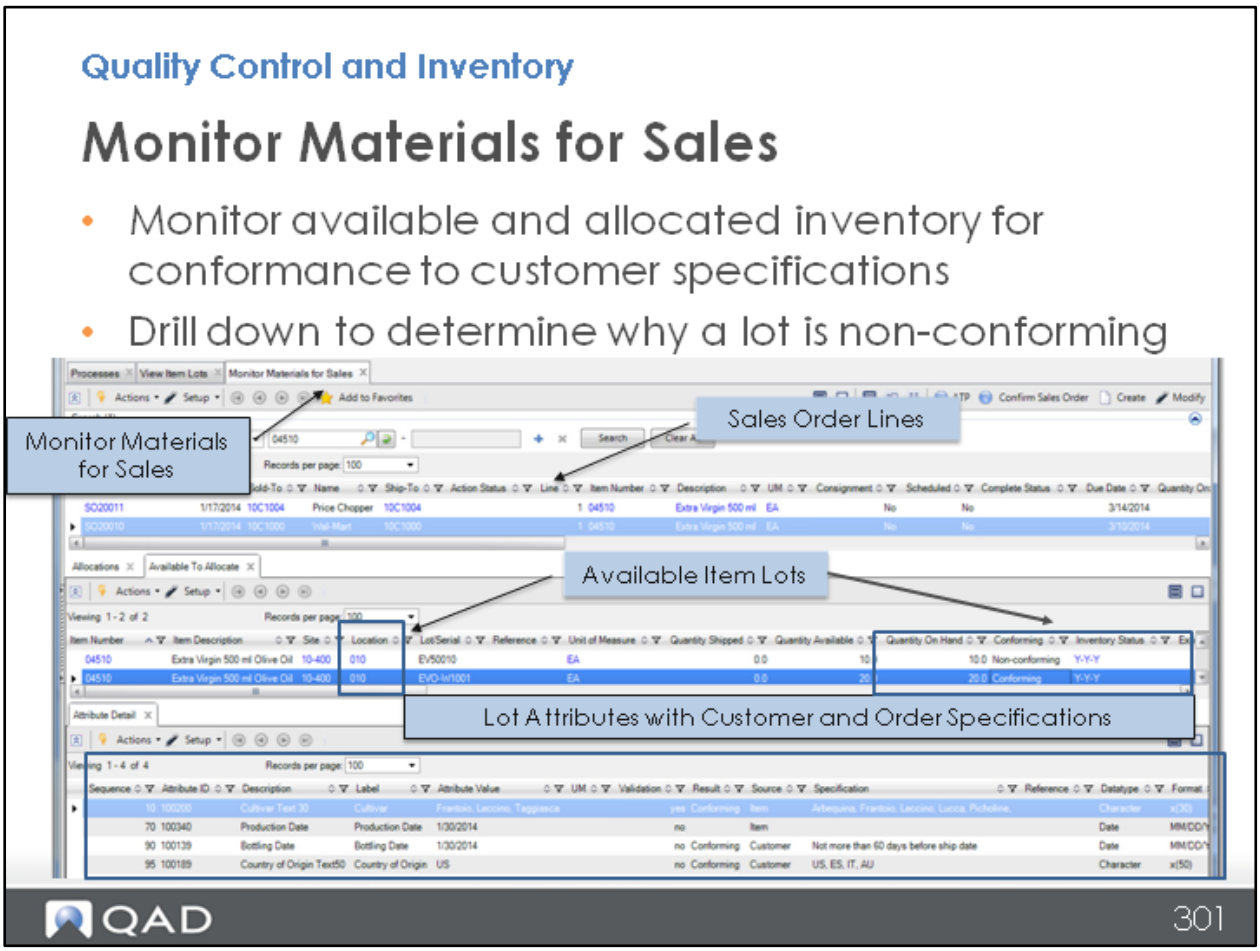
To create a quality order for both a lot and SO line, first select the Item, Site, and Lot. Then, create the order. Then, specify the Sales Order and Line for which you are inspecting.

Customer and SO Line Specifications



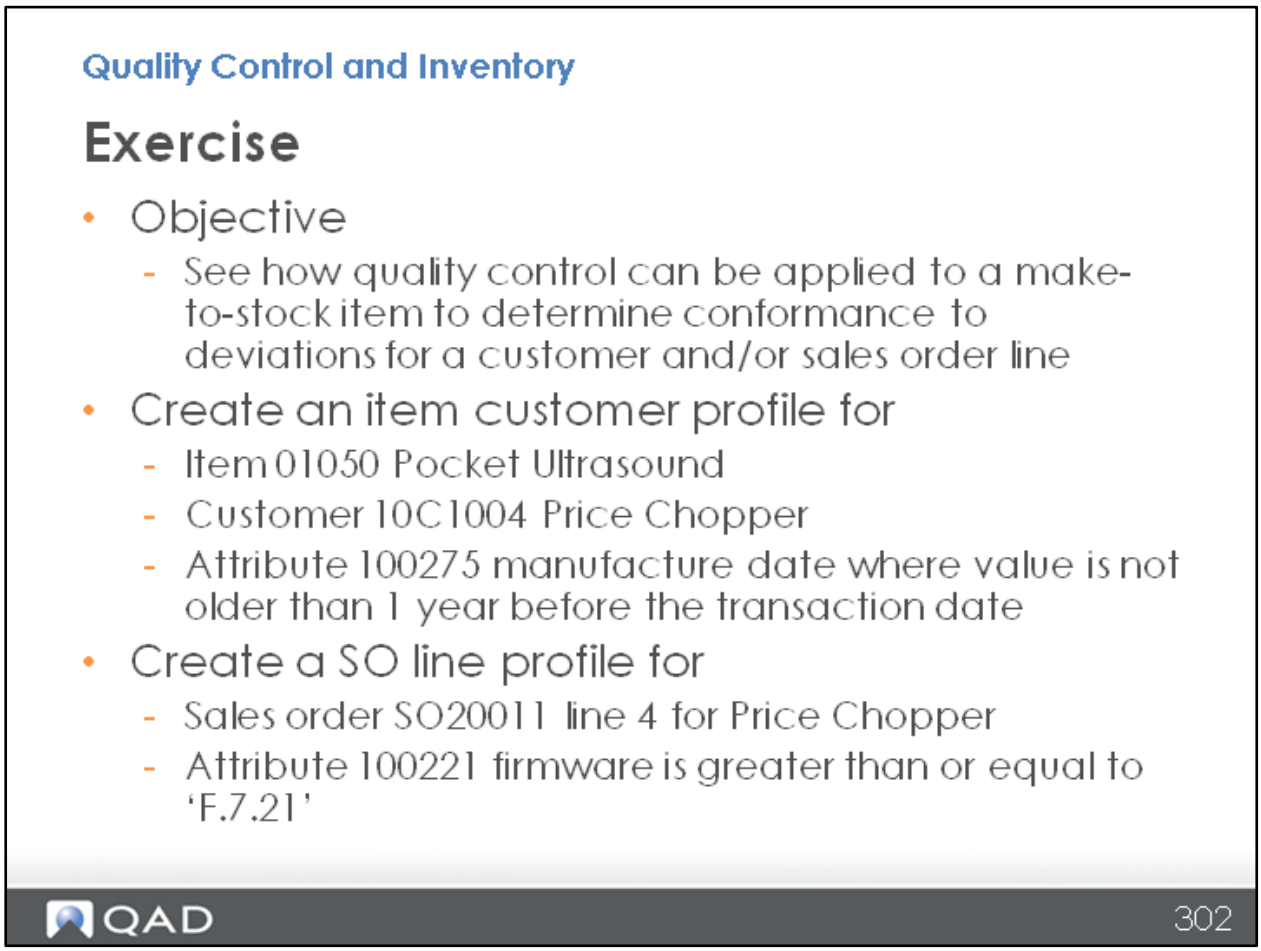
Quality order attribute specifications include customer and SO line specifications for attributes from profiles as well as test recordsAttributes gained through this type of order have a Source value of Customer. They otherwise function much like other quality orders.

Monitor Materials for Sales

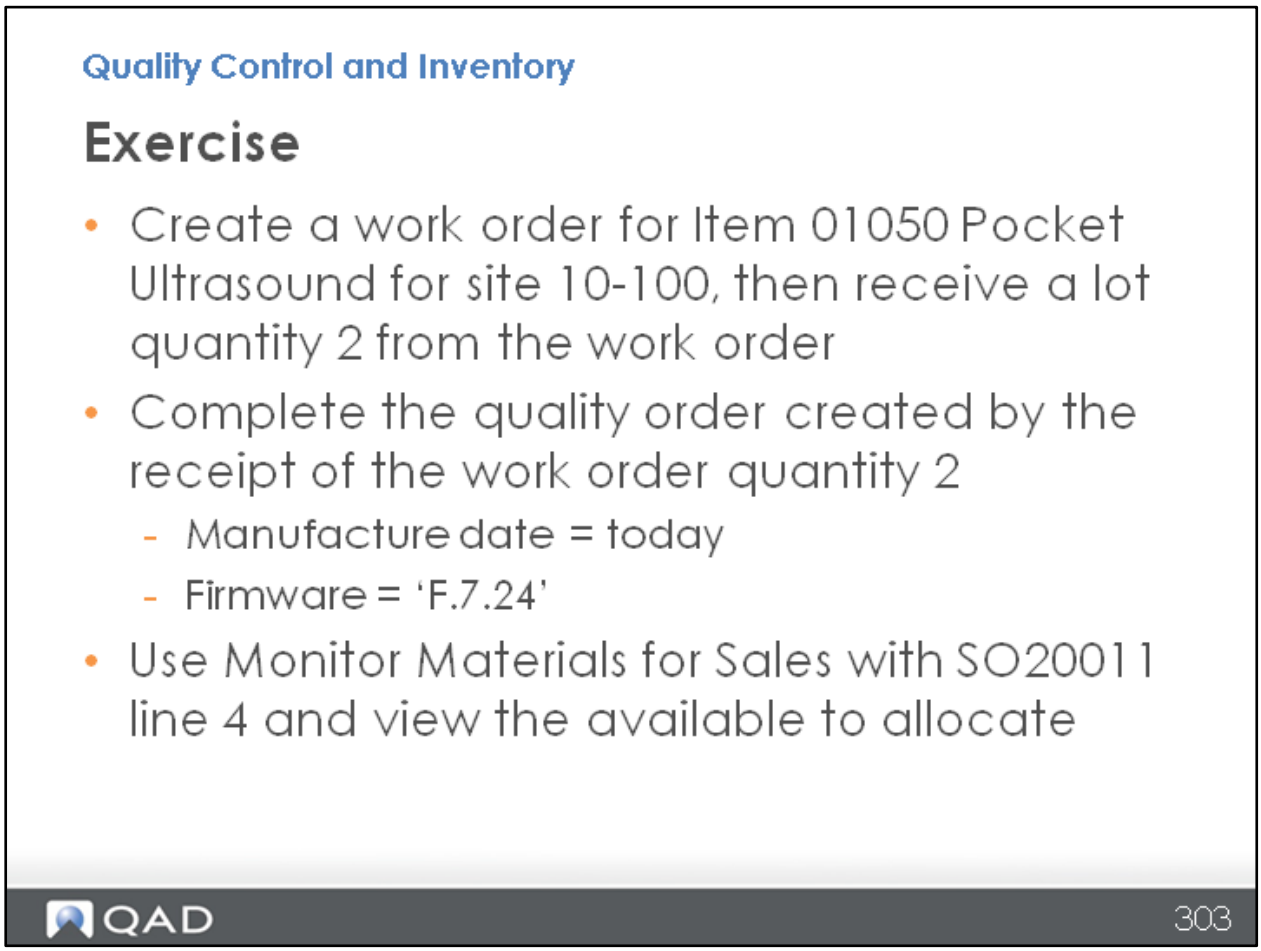


The Monitor Materials for Sales browse collection provides a more thorough view of materials for orders than View Item Lots. The conformance of attributes calculates dynamically based on the current values and specifications which relate to these attributes.
Sales orders are organized here to provide insight into current available allocations. Use this browse collection to plan shipping allocations.

Exercise


Quality Control and Inventory
Exercise
Objective
See how quality control can be applied to a make-to-stock item to determine conformance to deviations for a customer and/or sales order line
Create an item customer profile for
Item 01050 Pocket Ultrasound
Customer 10C1004 Price Chopper
Attribute 100275 manufacture date where value is not older than 1 year before the transaction date
Create a SO line profile for
Sales order SO20011 line 4 for Price Chopper
Attribute 100221 firmware is greater than or equal to 'F.7.21'
QAD
302

Exercise

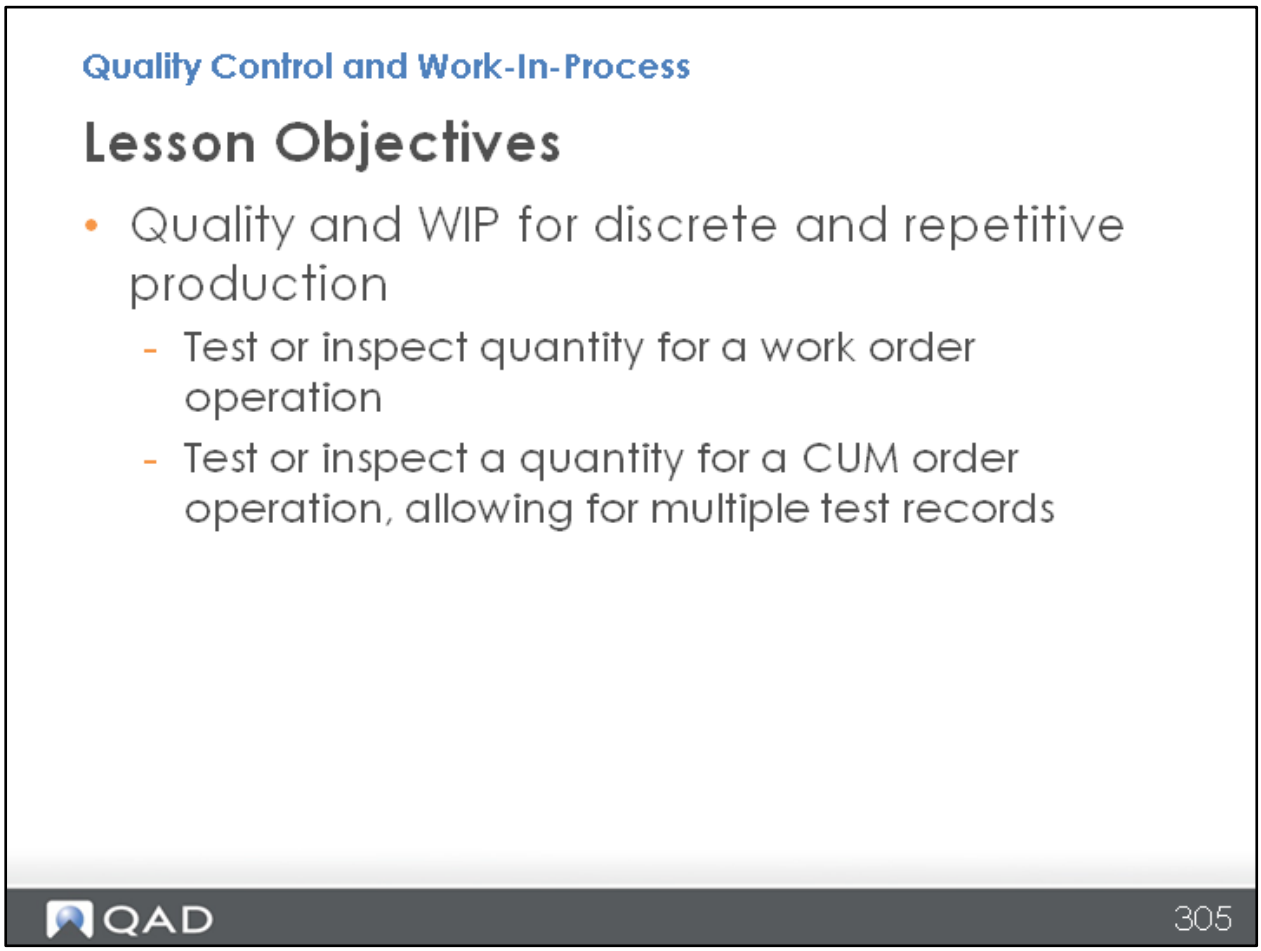

Quality Control and Inventory
Exercise
• Create a work order for Item 01050 Pocket Ultrasound for site 10-100, then receive a lot quantity 2 from the work order
• Complete the quality order created by the receipt of the work order quantity 2
- Manufacture date = today
- Firmware = 'F.7.24'
• Use Monitor Materials for Sales with SO20011 line 4 and view the available to allocate
QAD
303

CHAPTER 10

Quality Control and Work-In-Process

Quality Control and Work-In-Process

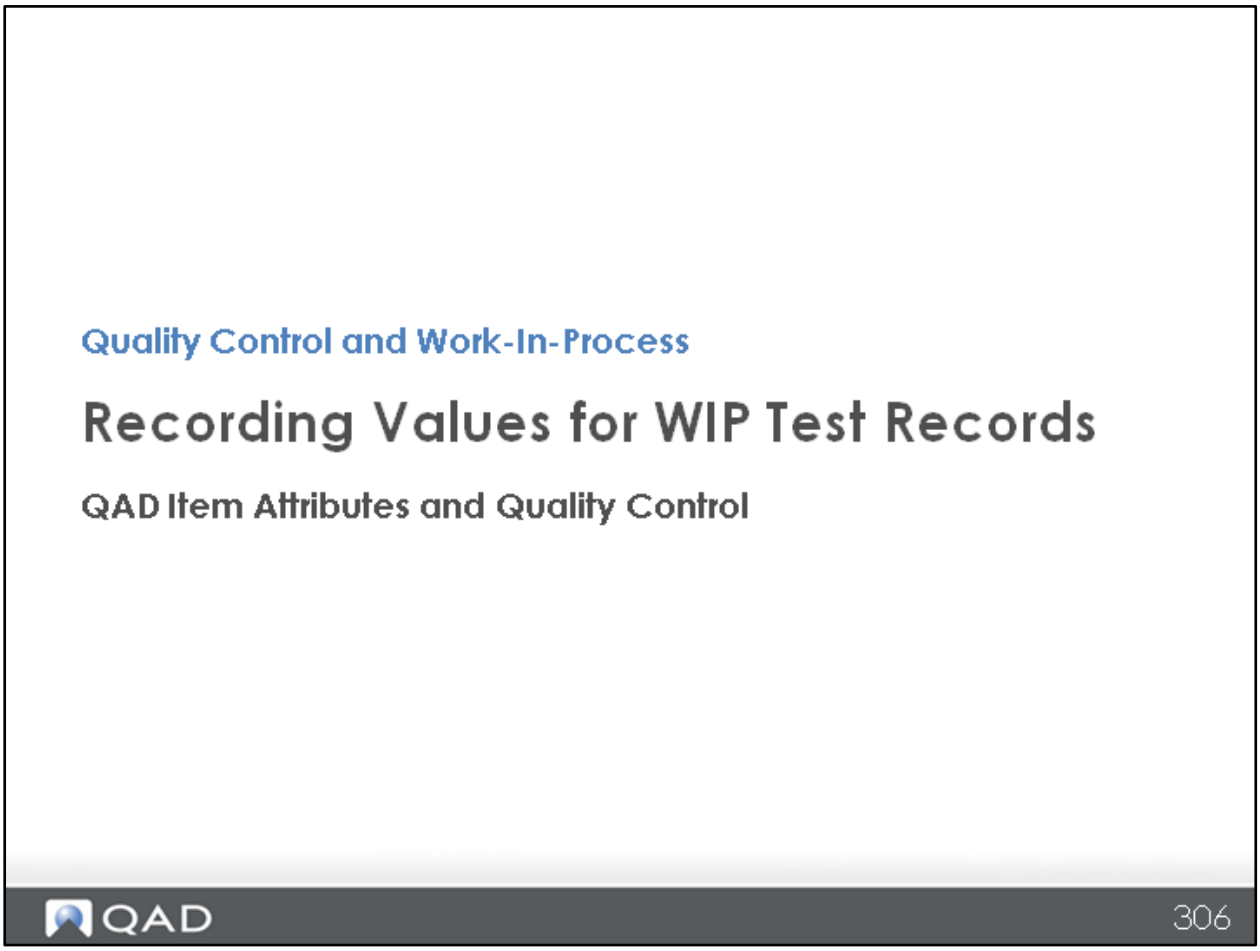
Lesson Objectives



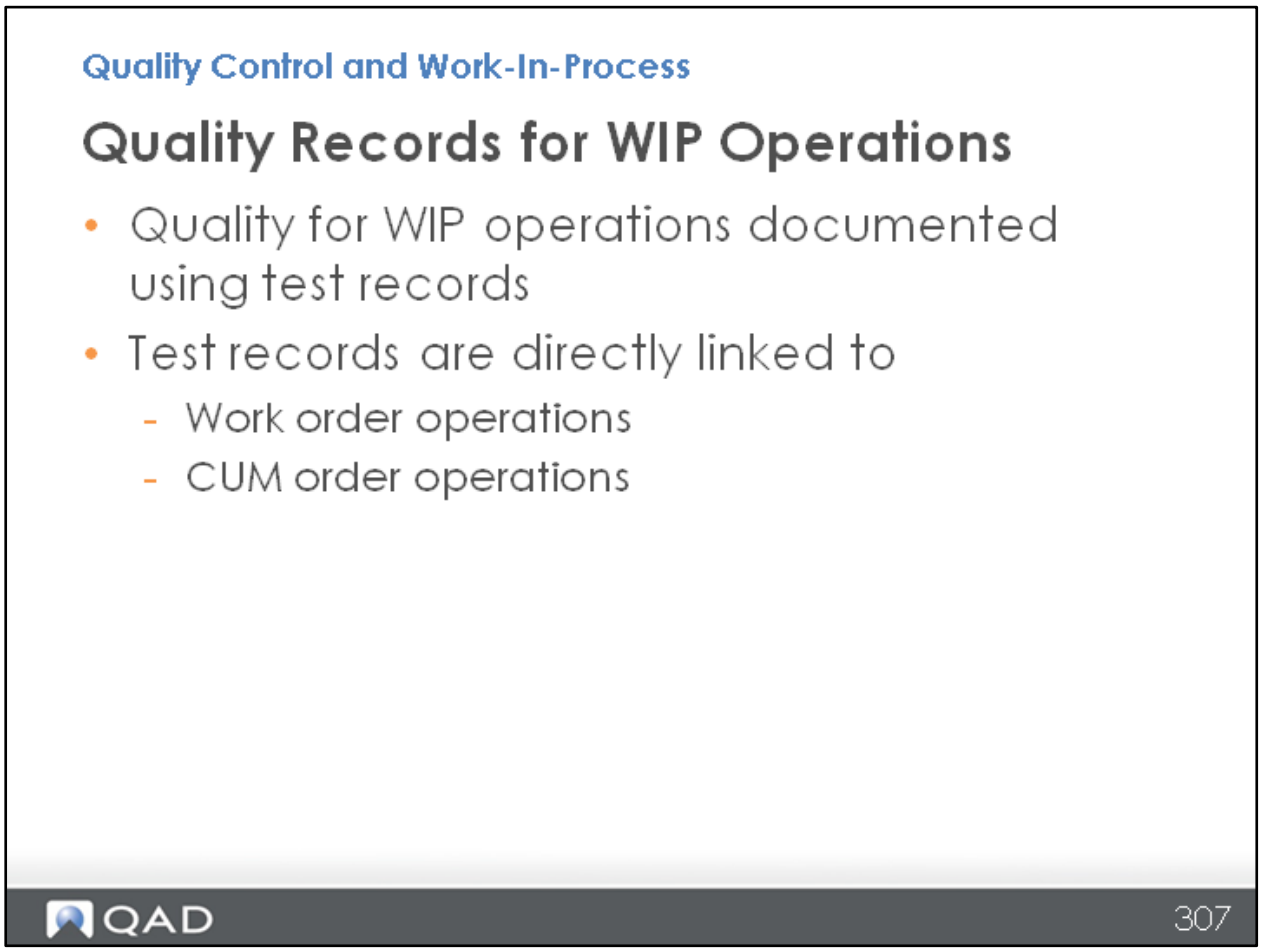
By the end of this training, you will be able to process quality for work orders.

This means that you will be able to process and explain how test records attach to both work orders and repetitive cum orders. This allows you to test ongoing processes, and to attach multiple records to repetitive processes where necessary.

Recording Values for WIP Test Records



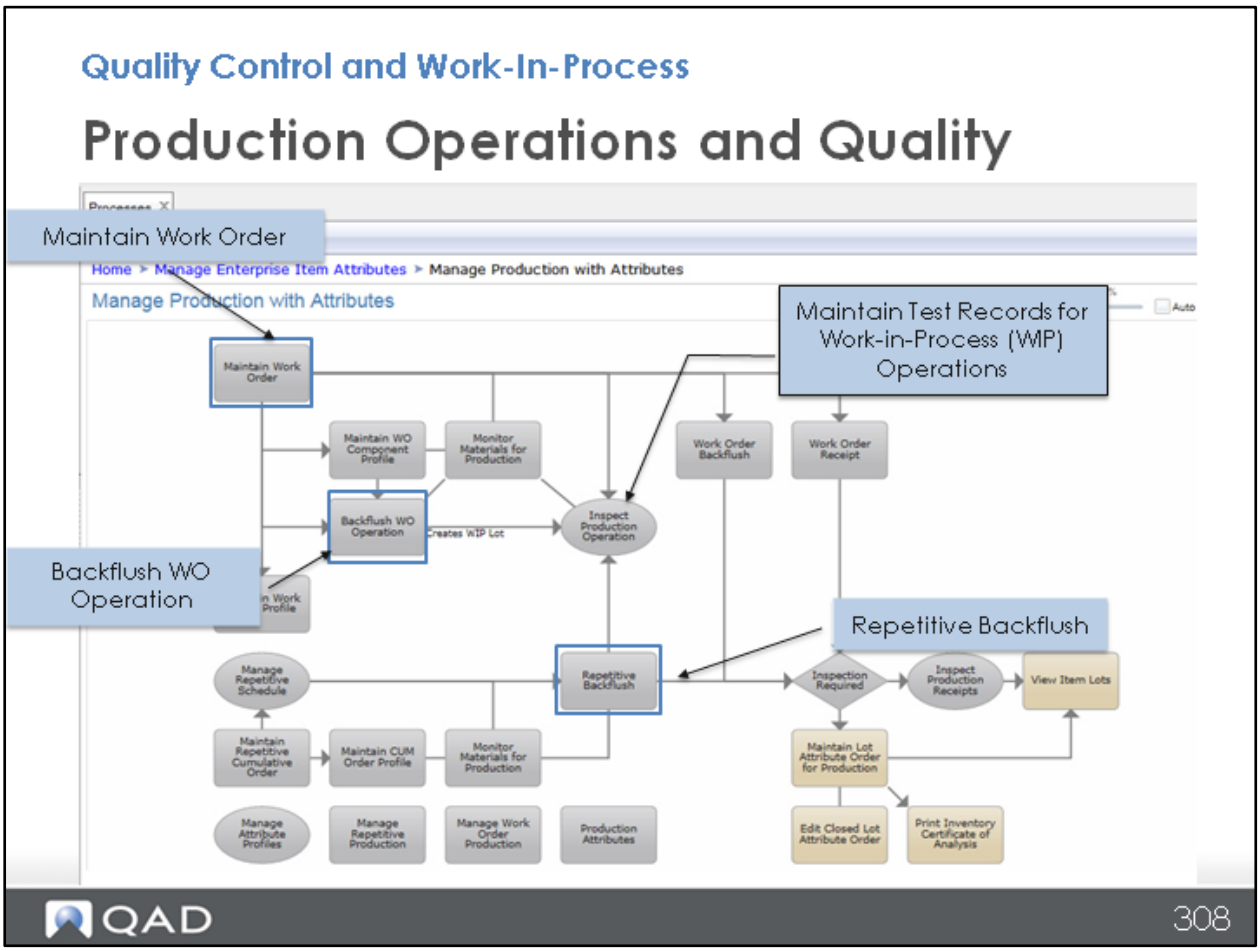
Quality Records for WIP Operations



This section of training continues the discussion of how quality control functions for work-in-process operations.

As with other records, quality control utilizes test records to contain attributes. Here, they are linked directly to work orders and CUM orders.

Production Operations and Quality

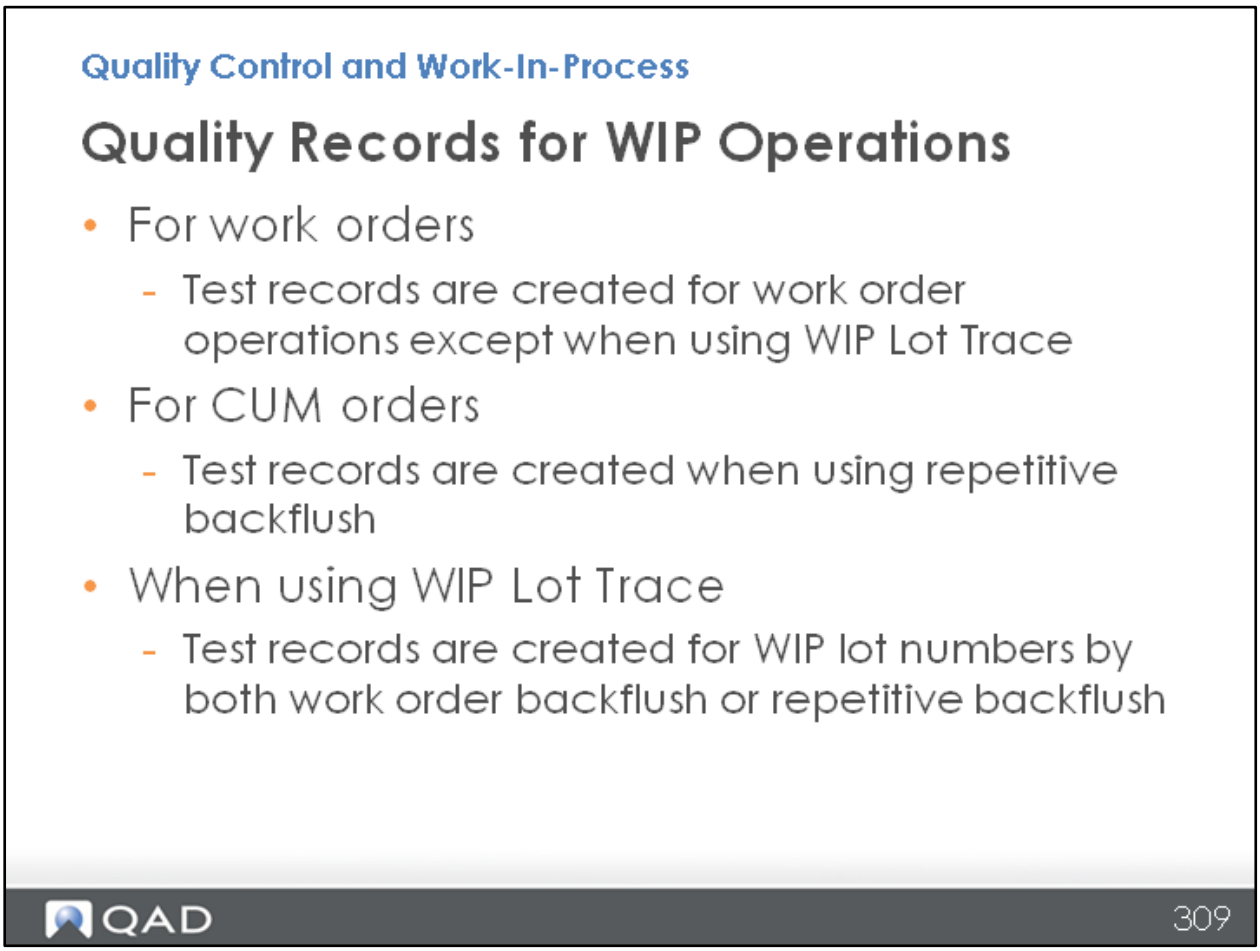


Quality control for work in process operations requires working with work orders, production operations, and backflush opertions.

Find the process maps to control these operations here:

Home > Manage Enterprise Item Attributes > Manage Production with Attributes

Quality Records for WIP Operations



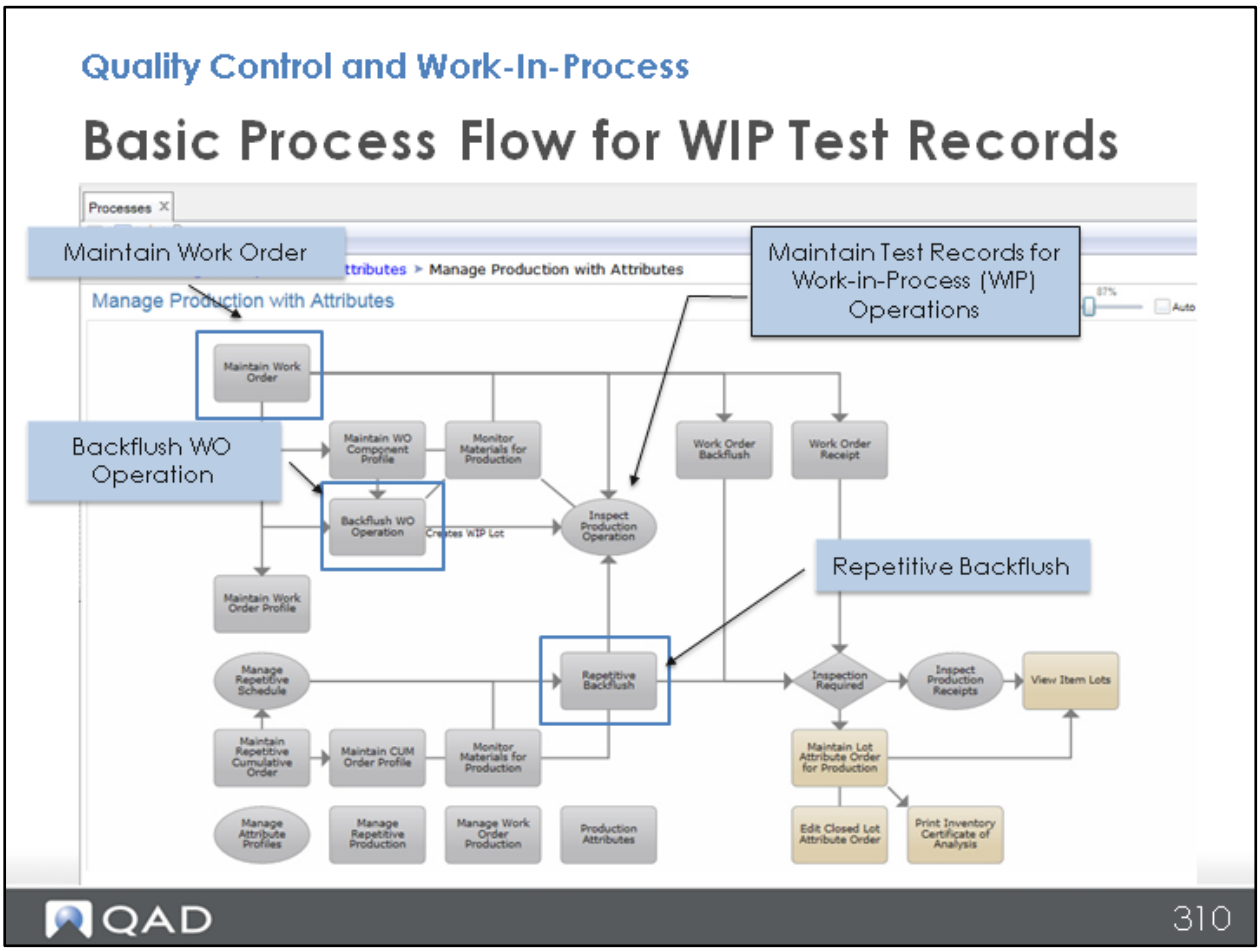
The creation of records for work-in-process operations triggers at different circumstances, depending on the type of order.

Work orders create test records for operations which do not use the WIP Lot Trace function.

CUM orders create test records at the time of the repetitive backflush.

Orders using the WIP Lot Trace function create test records during both work order backflushes and repetitive backflushes.

Basic Process Flow for WIP Test Records

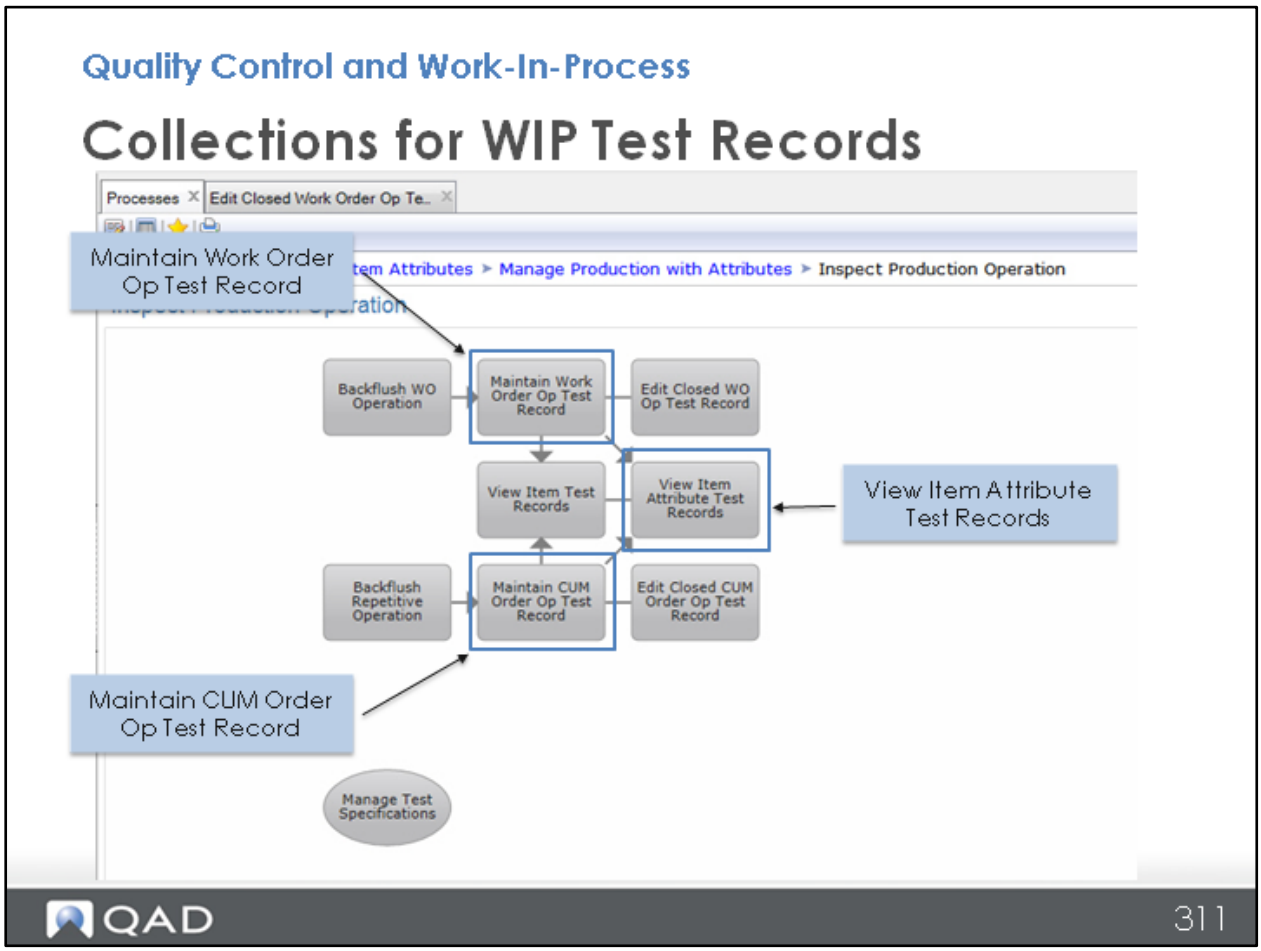


You can maintain these orders through the browse collections for work orders and CUM orders.

Find these functions within the process maps here:

Home > Manage Enterprise Item Attributes > Manage Production with Attributes

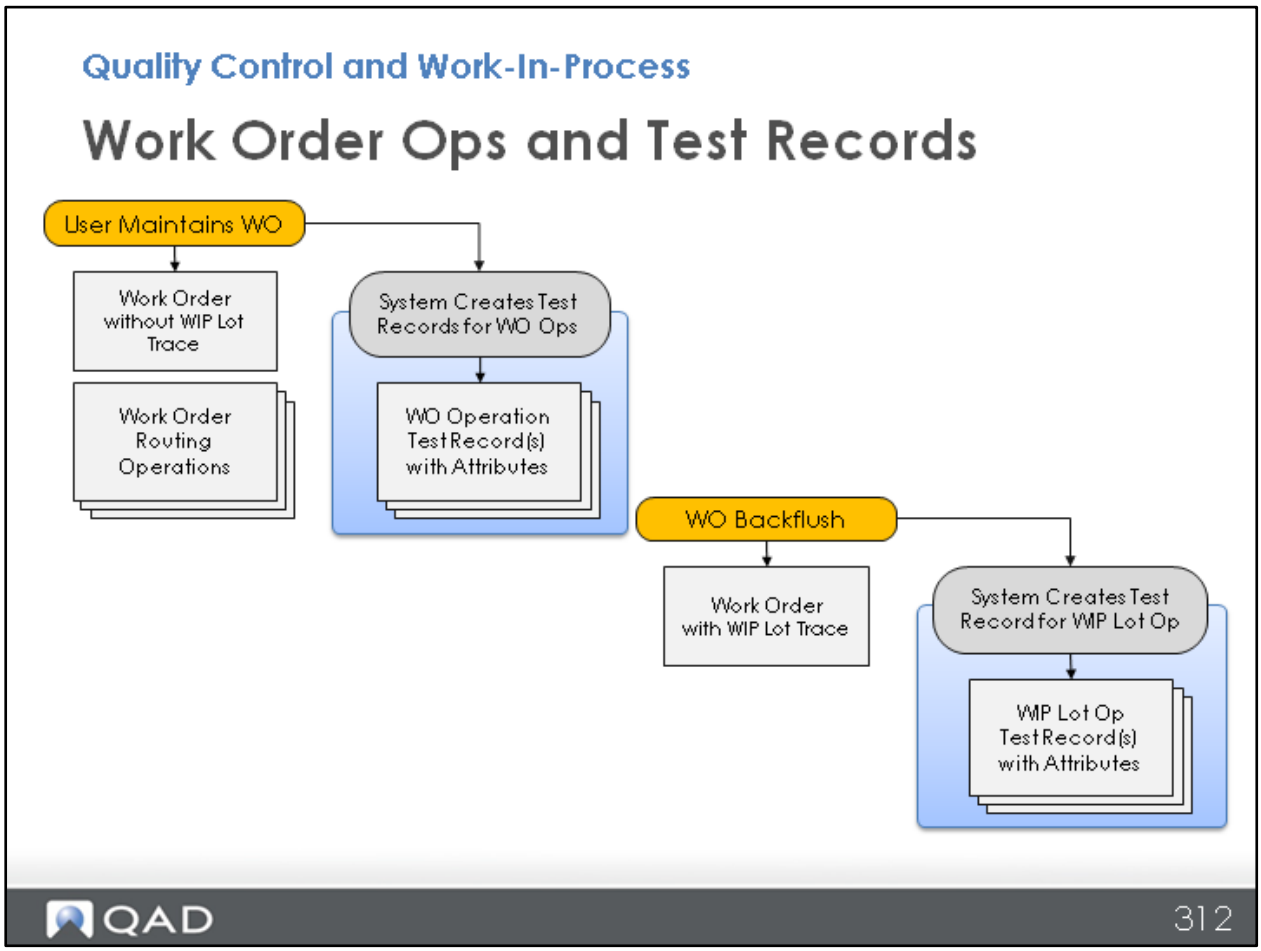
Collections for WIP Test Records



Functions dealing more specifically with the inspection of test records for WIP operations can be found within the process maps here:

Home > Manage Enterprise Item Attributes > Manage Production with Attributes > Inspect Production Operation

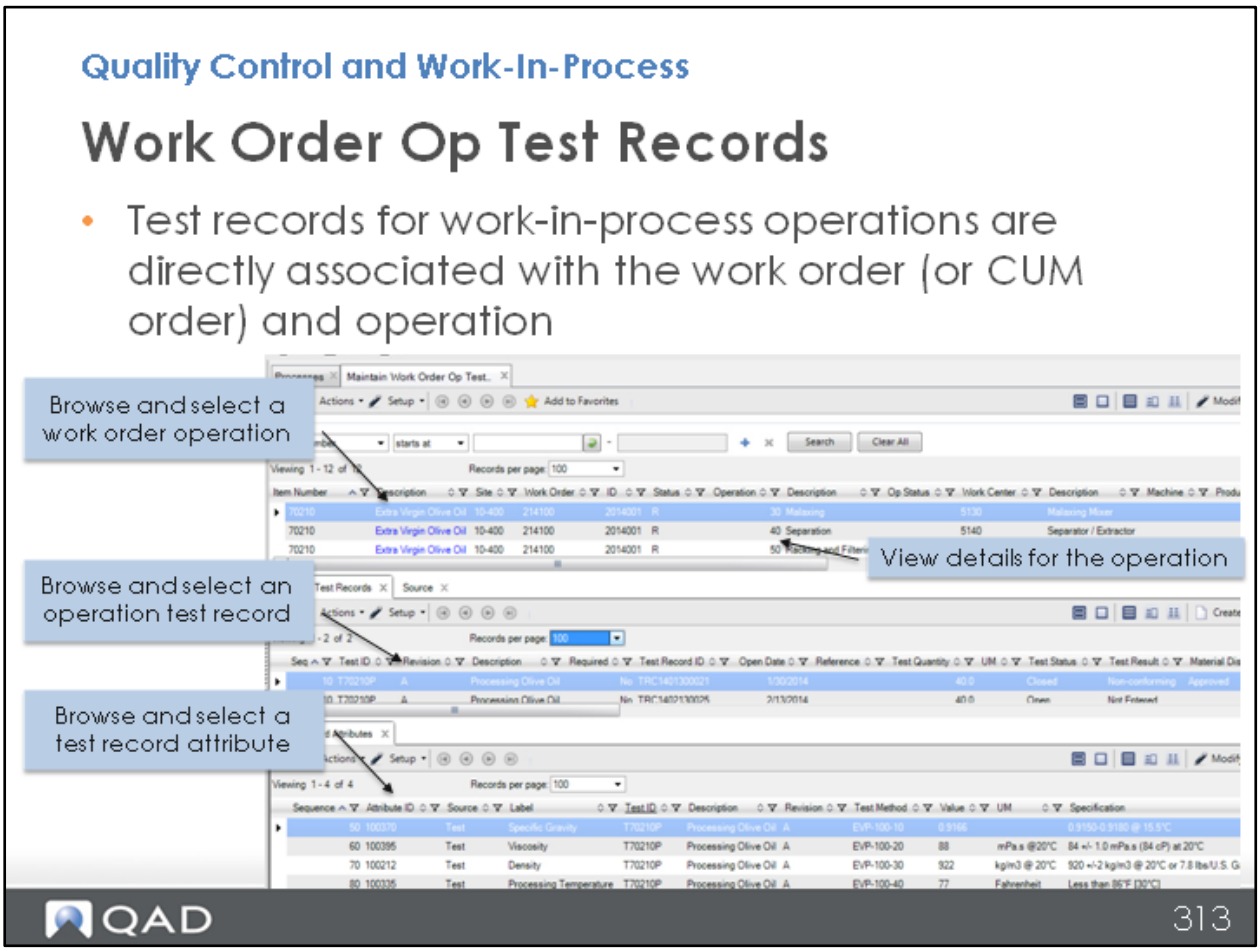
Work Order Ops and Test Records



When a work order does not have an attached WIP lot trace, the system creates test records for it automatically. These attach wherever there a test specification links to an item at one of that work orders routing operations.

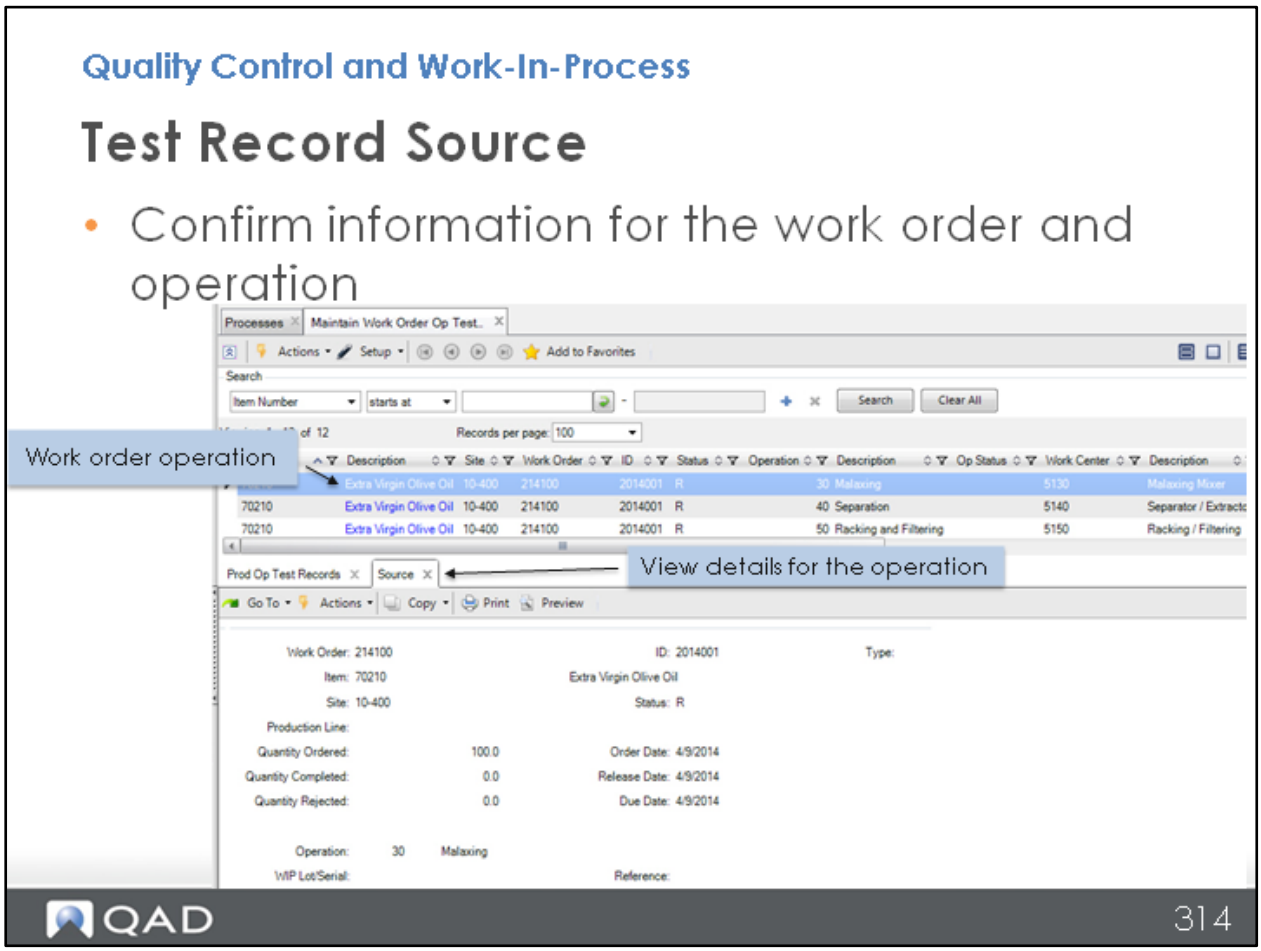
If a WIP lot trace exists, these records instead generate at the point of a work order backflush.

Work Order Op Test Records



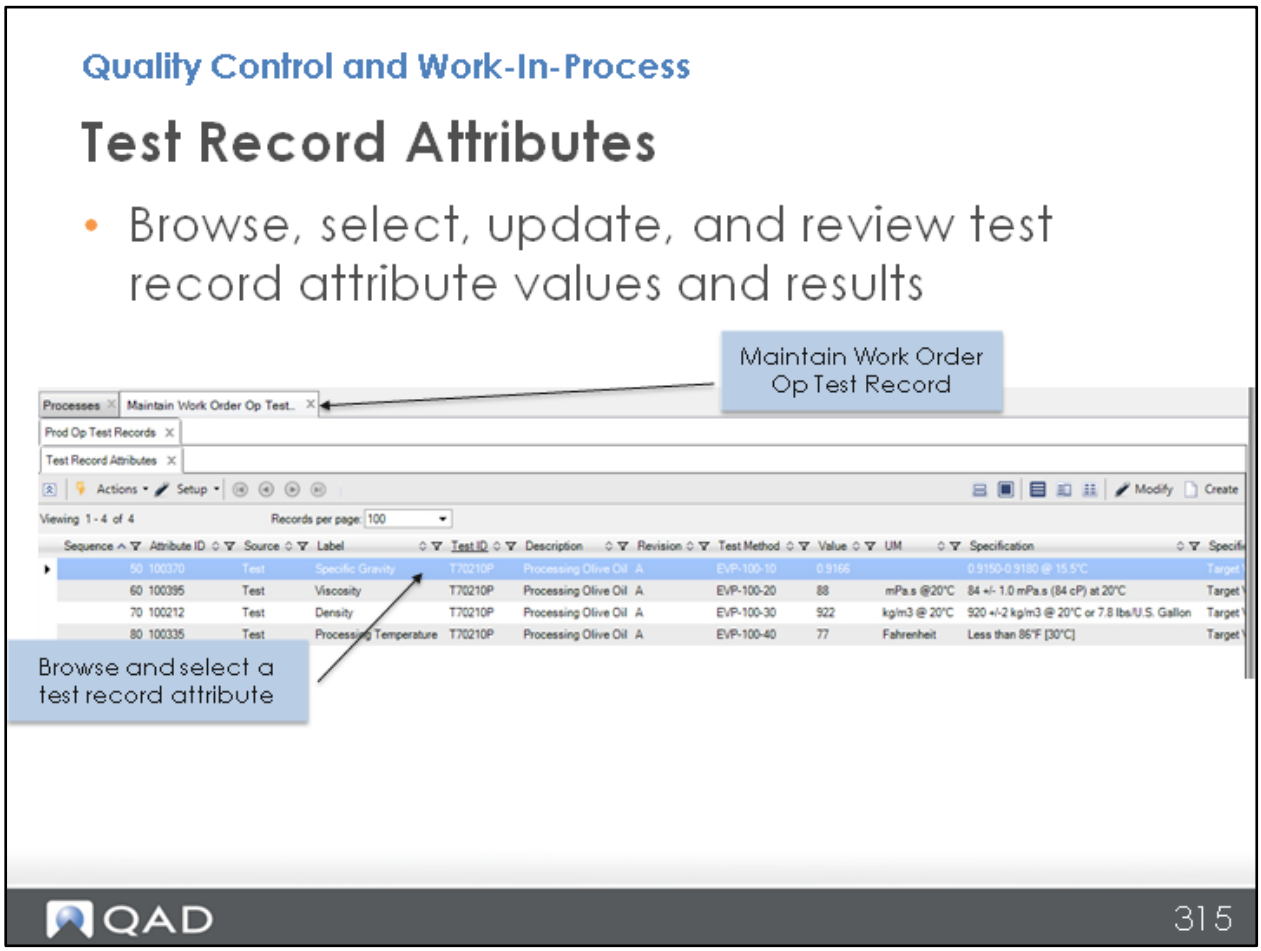
The image above depicts test records attached to work orders. Observe that each has an associated Operation, which describes to where in the work process the test specification attached.

Test Record Source

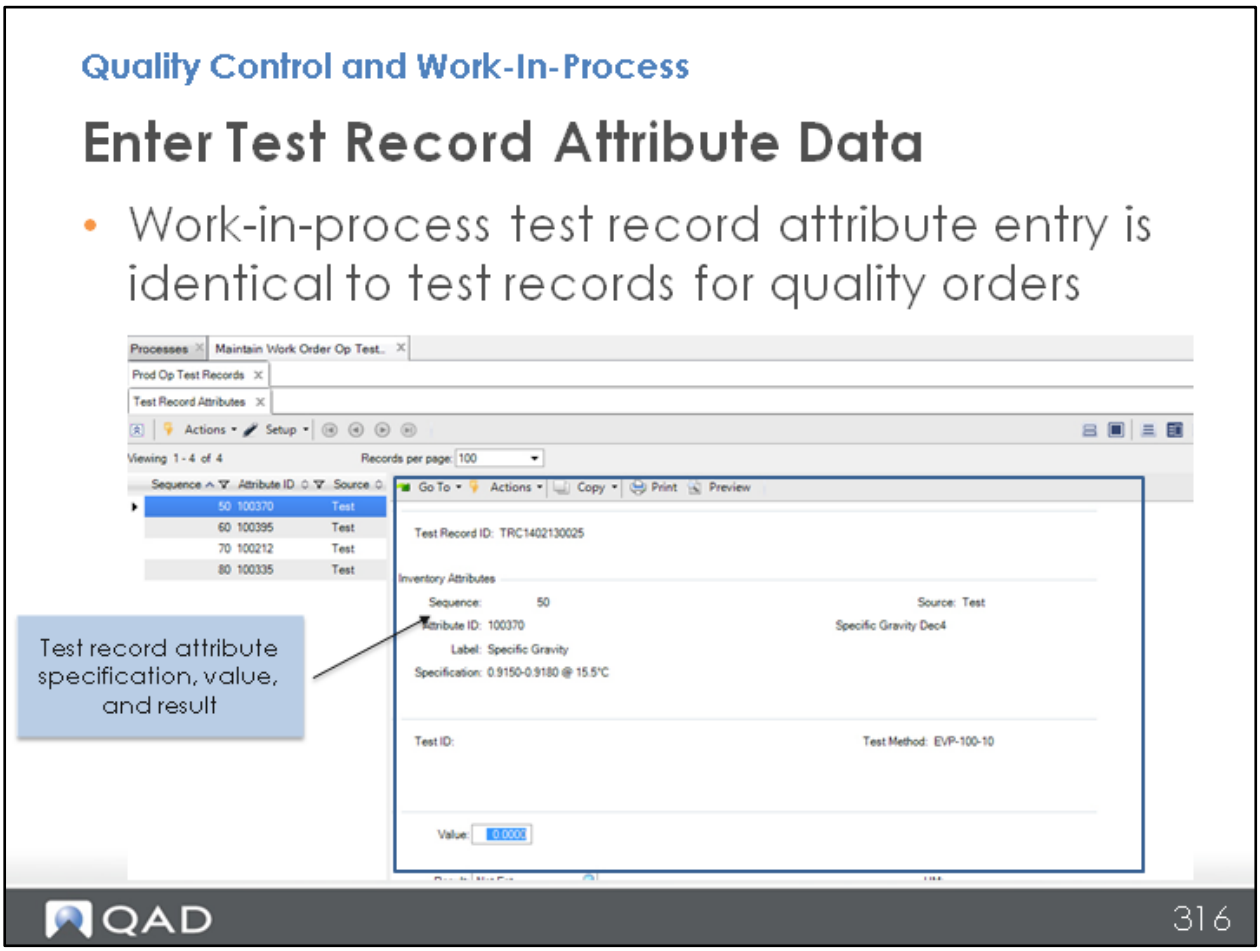


Enter the test records for work orders and CUM orders using the same process as for other test records.

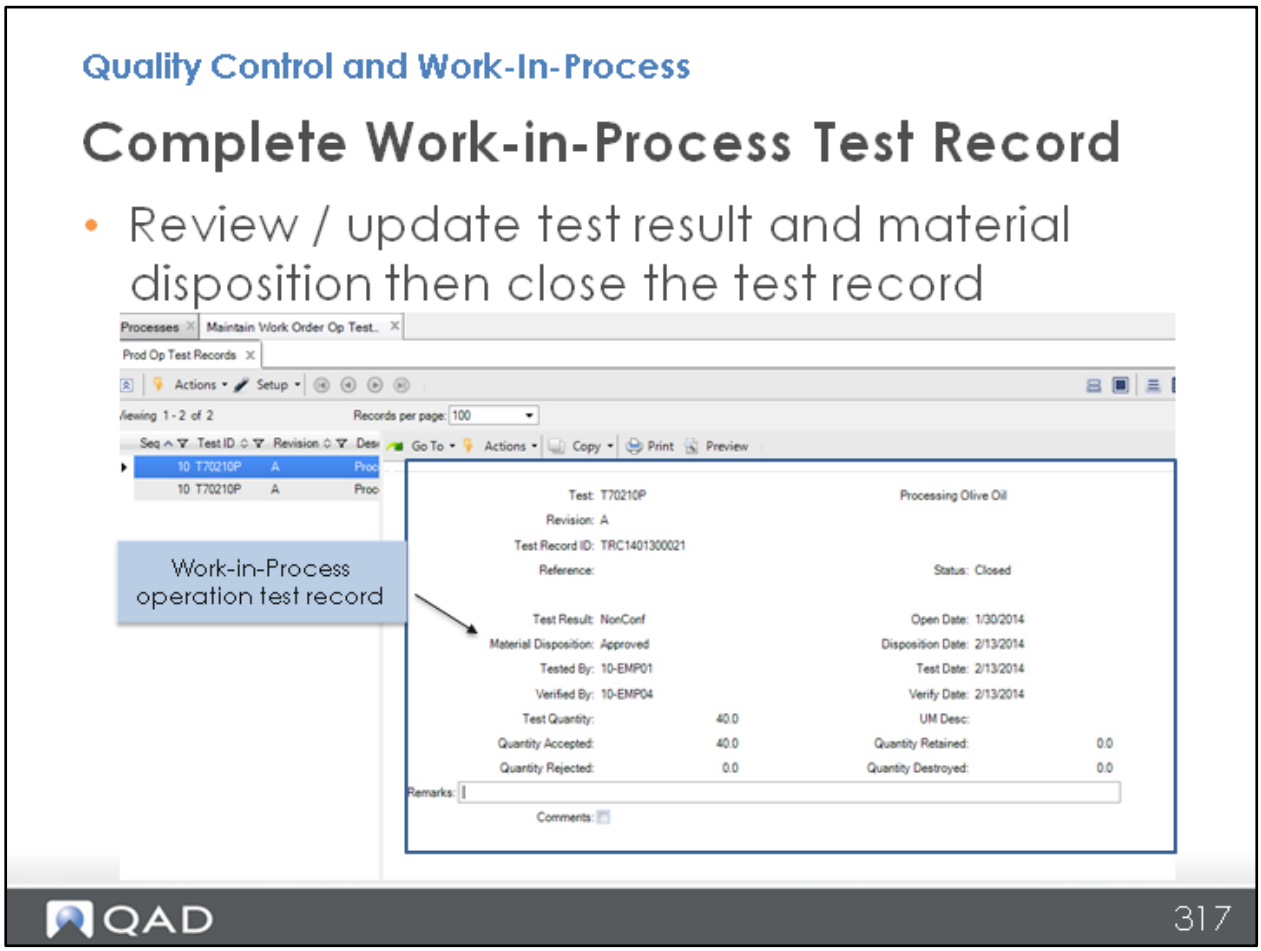
Test Record Attributes



Enter Test Record Attribute Data

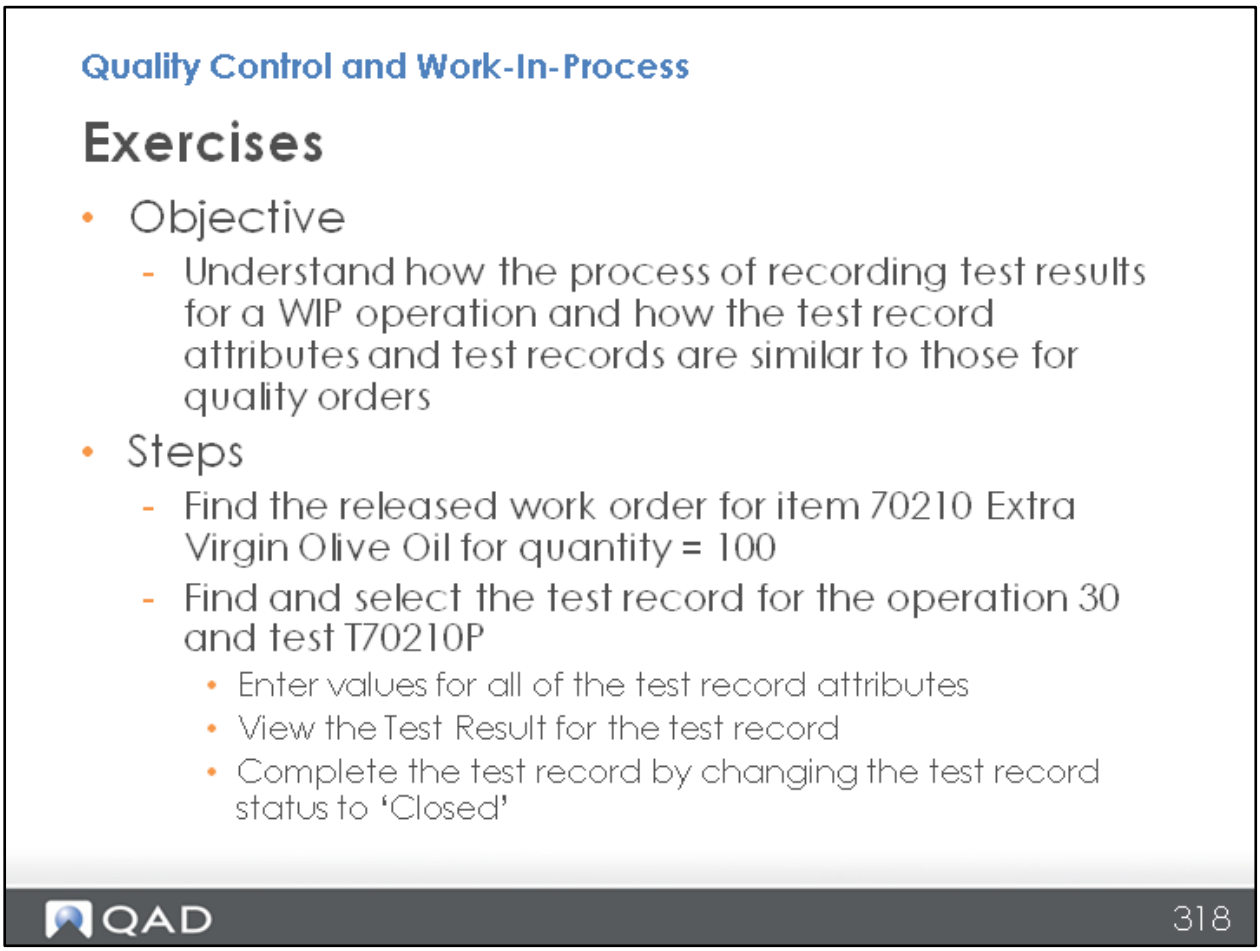


Complete Work-in-Process Test Record

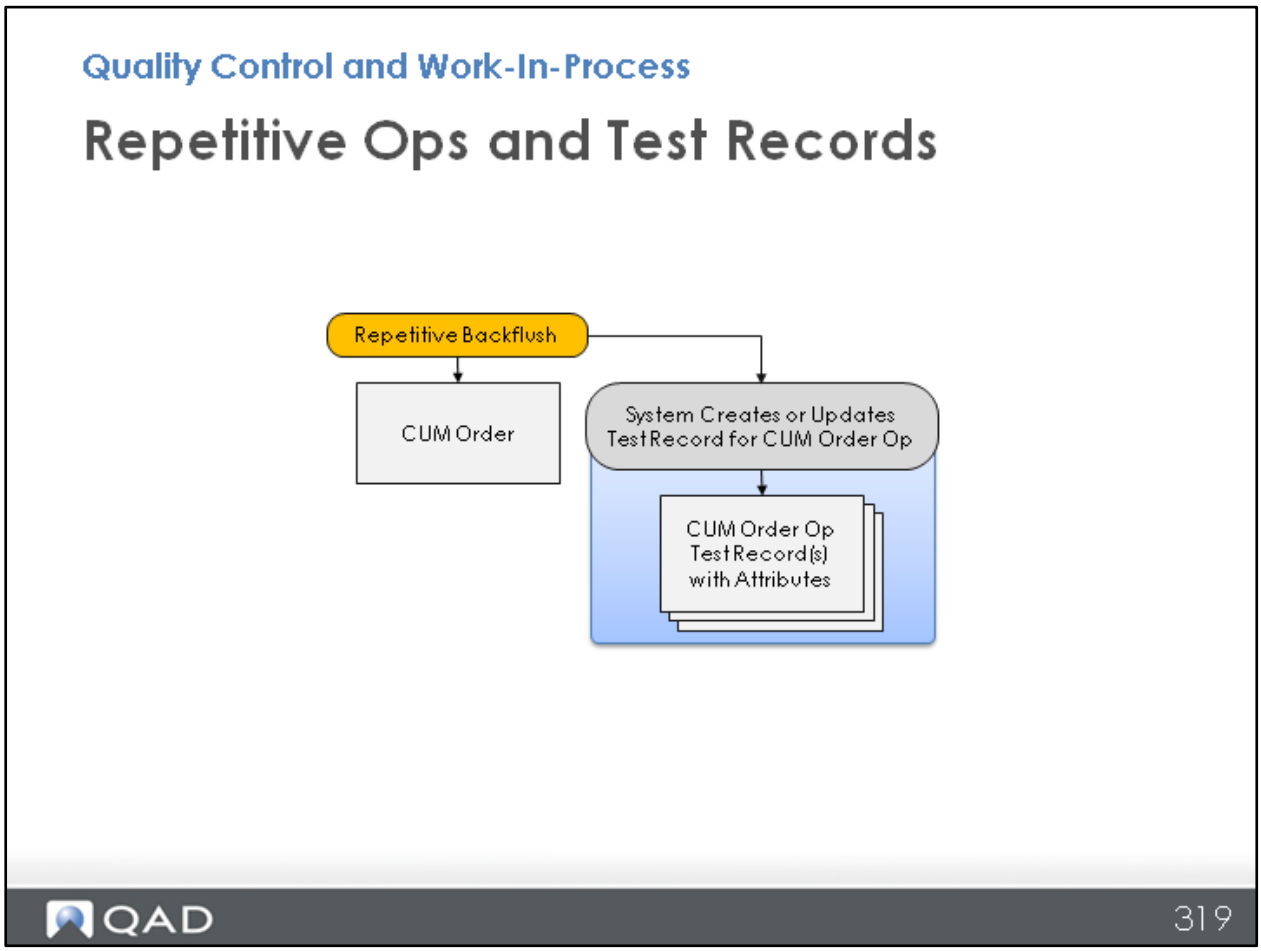


Enter the test records for work orders and CUM orders using the same process as for other test records.

Exercises


Quality Control and Work-In-Process
Exercises
Objective
Understand how the process of recording test results for a WIP operation and how the test record attributes and test records are similar to those for quality orders
Steps
Find the released work order for item 70210 Extra Virgin Olive Oil for quantity = 100
Find and select the test record for the operation 30 and test T70210P
Enter values for all of the test record attributes
View the Test Result for the test record
Complete the test record by changing the test record status to 'Closed'
QAD
318

Repetitive Ops and Test Records

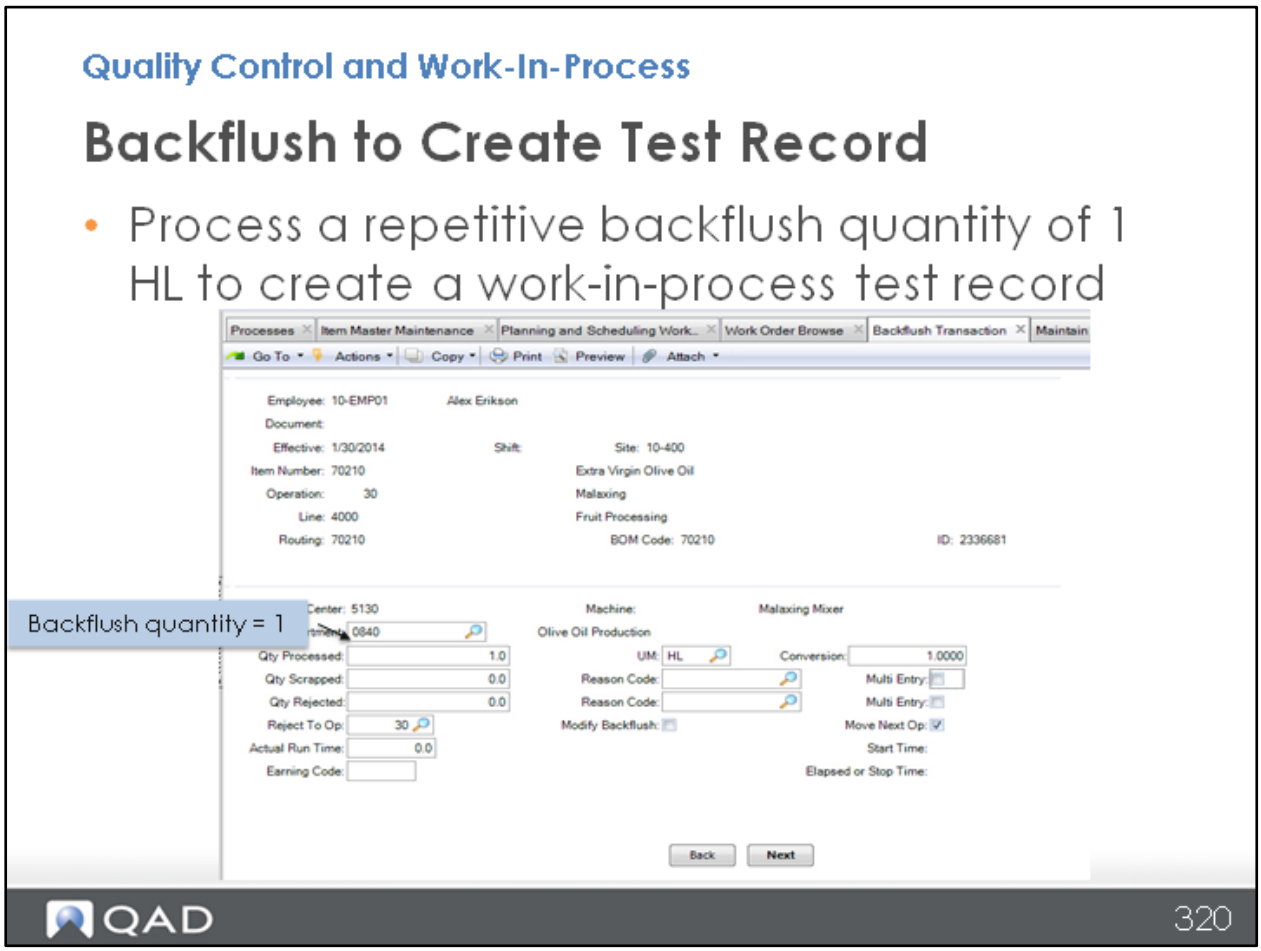


Test records for CUM orders trigger differently than those created for work orders. Whereas work order test records involve distinct work operations, CUM order test records deal with repetitive processes.

These trigger at each repetitive backflush. As a result, this process repeats with each subsequent backflush.

If the order is open, subsequent backflushes update the test record. If the order is closed, a new order is created instead.

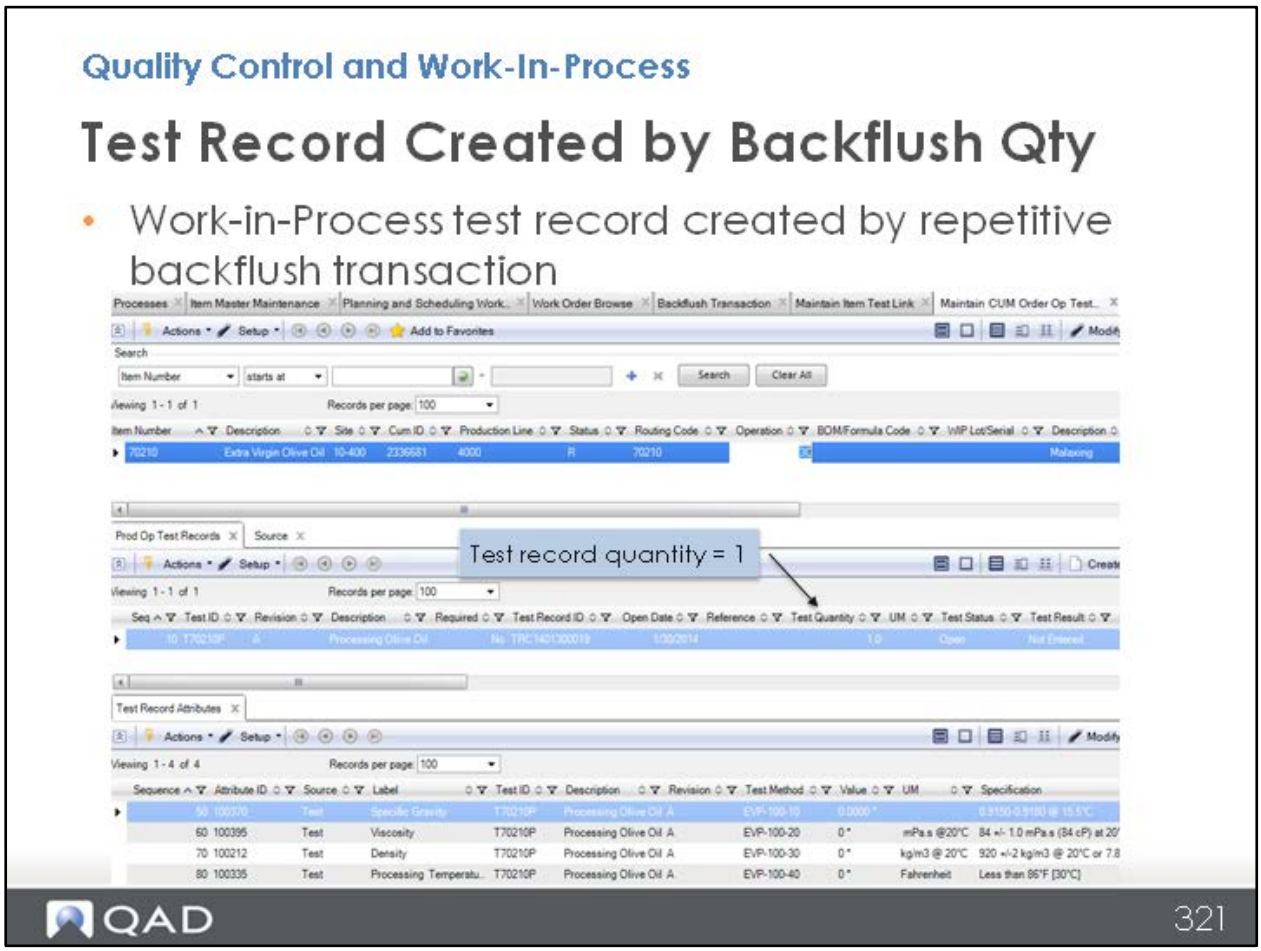
Backflush to Create Test Record



To demonstrate this process, begin with a repetitive backflush operation. The graphic above depicts a repetitive backflush for extra virgin olive oil.

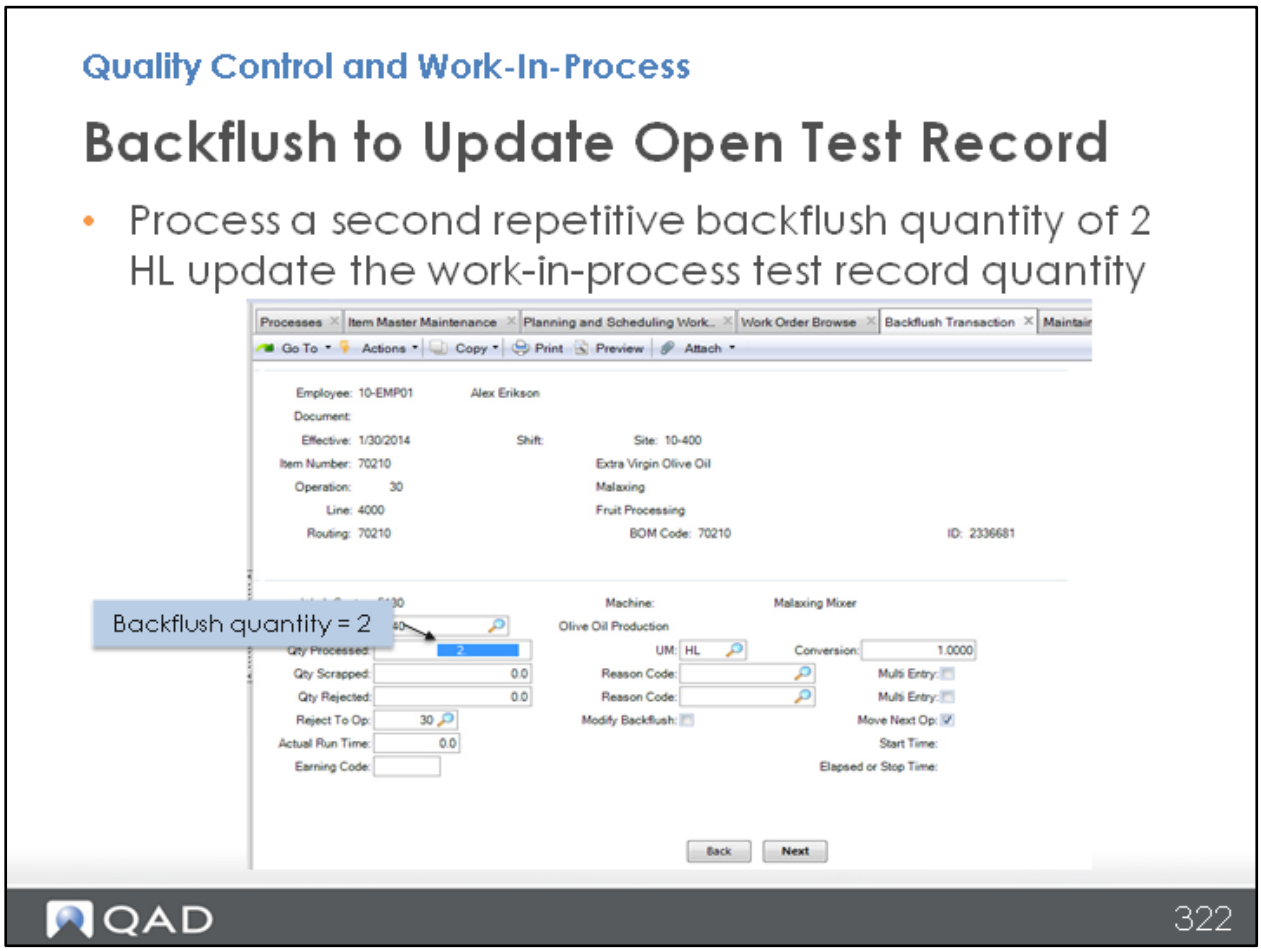
For demonstration purposes, this backflush has a quantity of 1.

Test Record Created by Backflush Qty



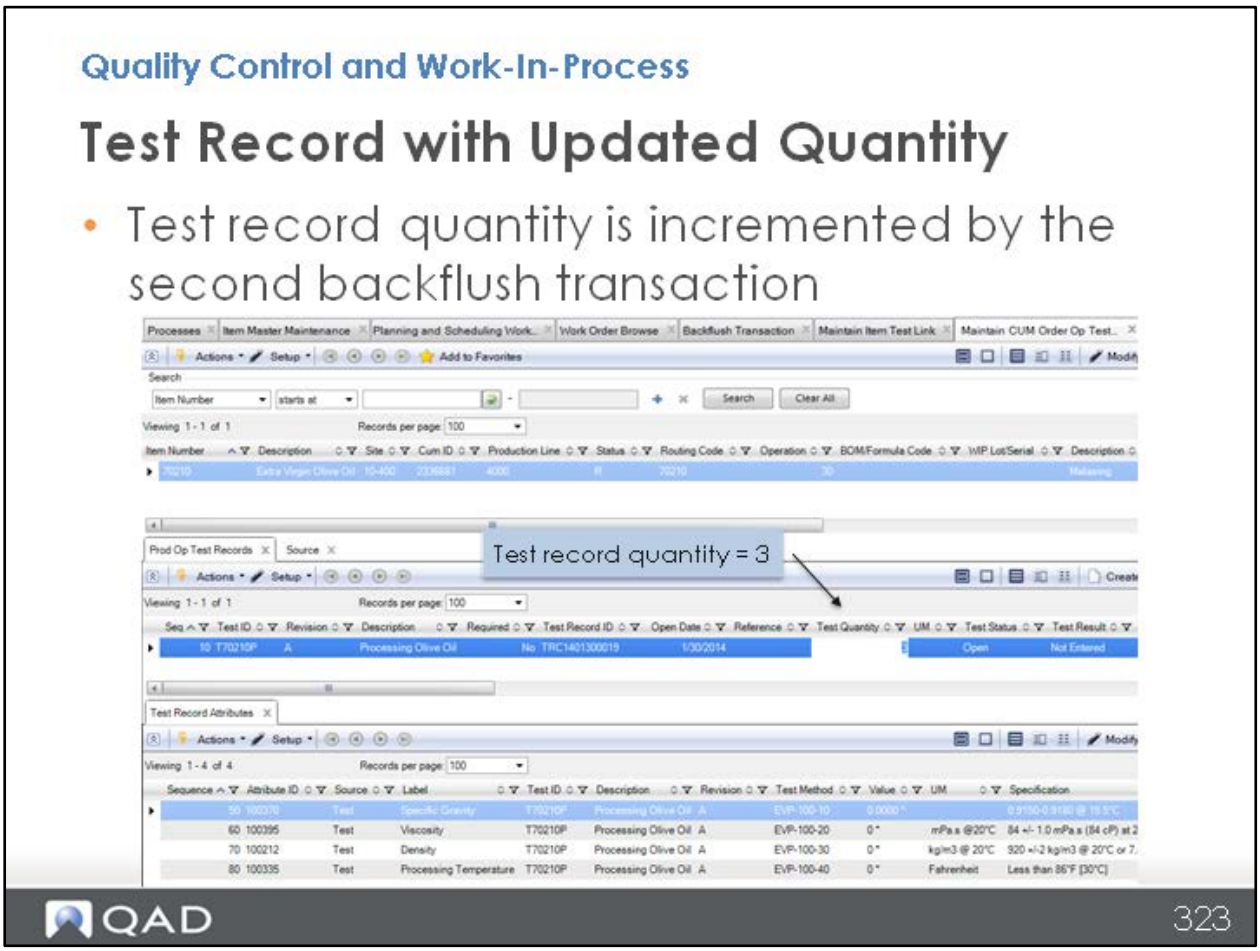
The Maintain CUM Order Op Test Records browse collection lists test records created for CUM orders. Here, you can see a test record attached to this CUM ID with a quantity of 1.

Backflush to Update Open Test Record



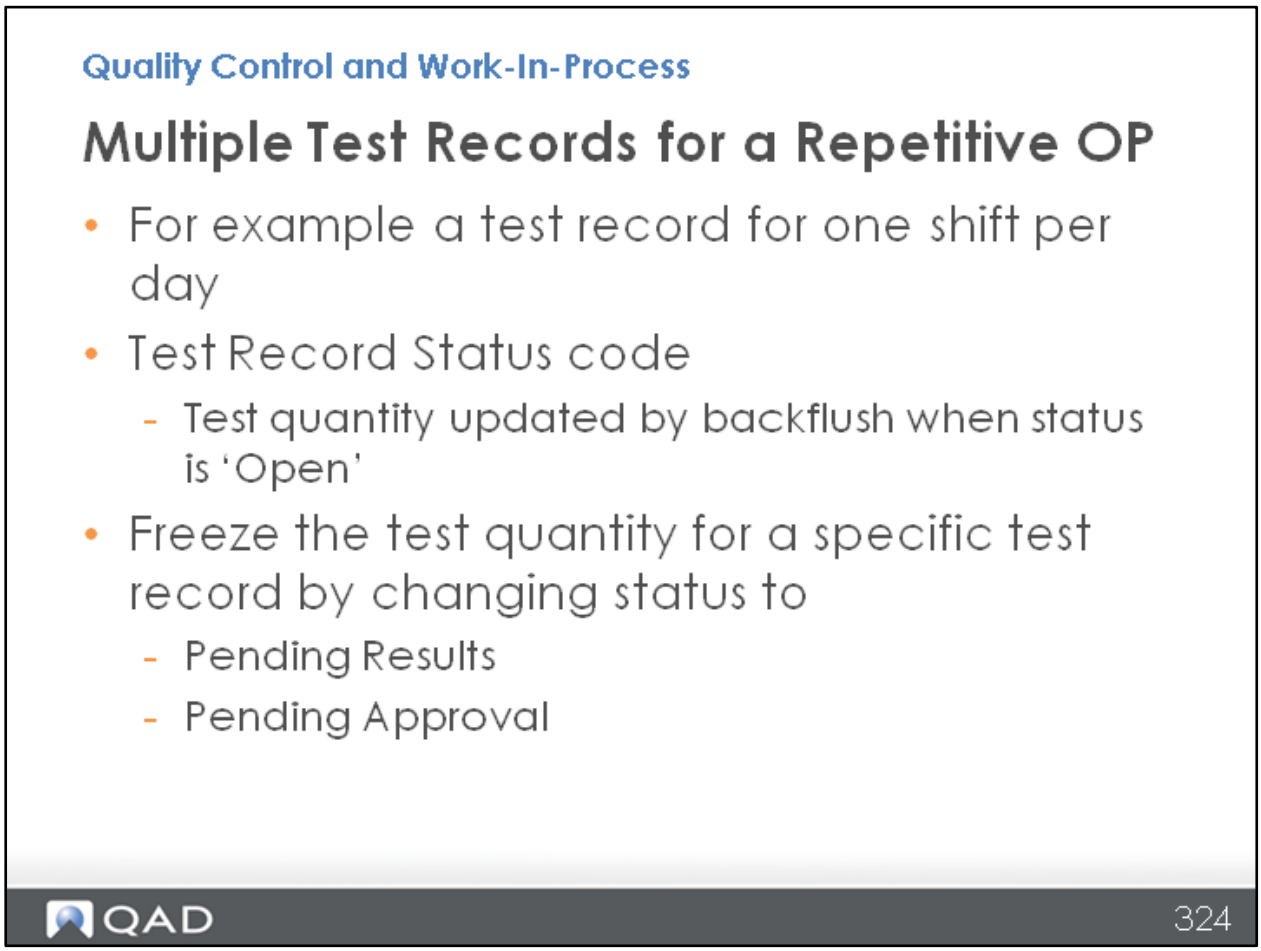
Another backflush transaction occurs. This time, with a quantity of 2.

Test Record with Updated Quantity



Because a test record for this CUM ID is open, the backflush updates the record. The additional quantity of 2 adds to the original quantity of 1. The test record now has a quantity of 3.

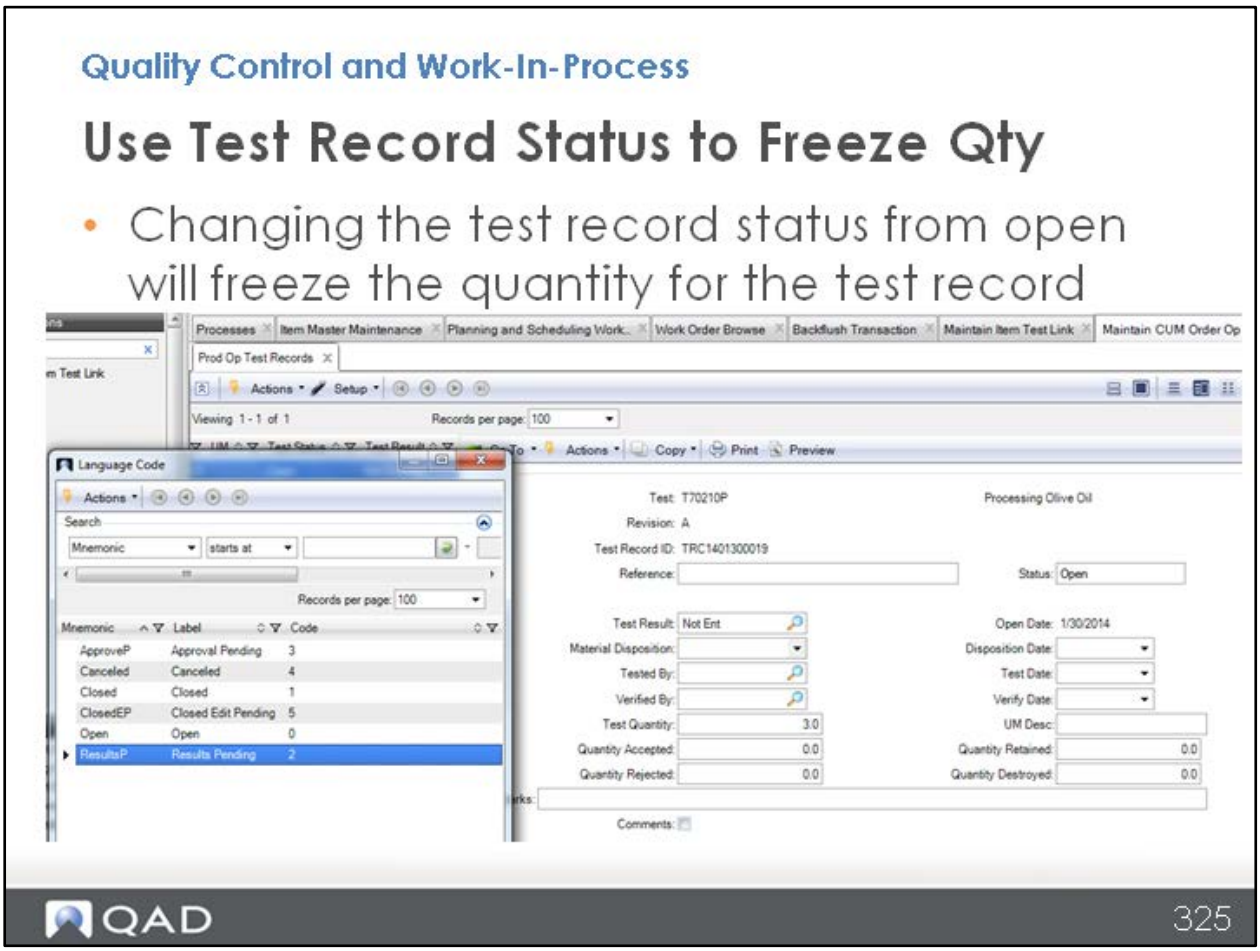
Multiple Test Records for a Repetitive OP



The Status of the test record determines whether the quantity of the test record updates from subsequent backflushes.

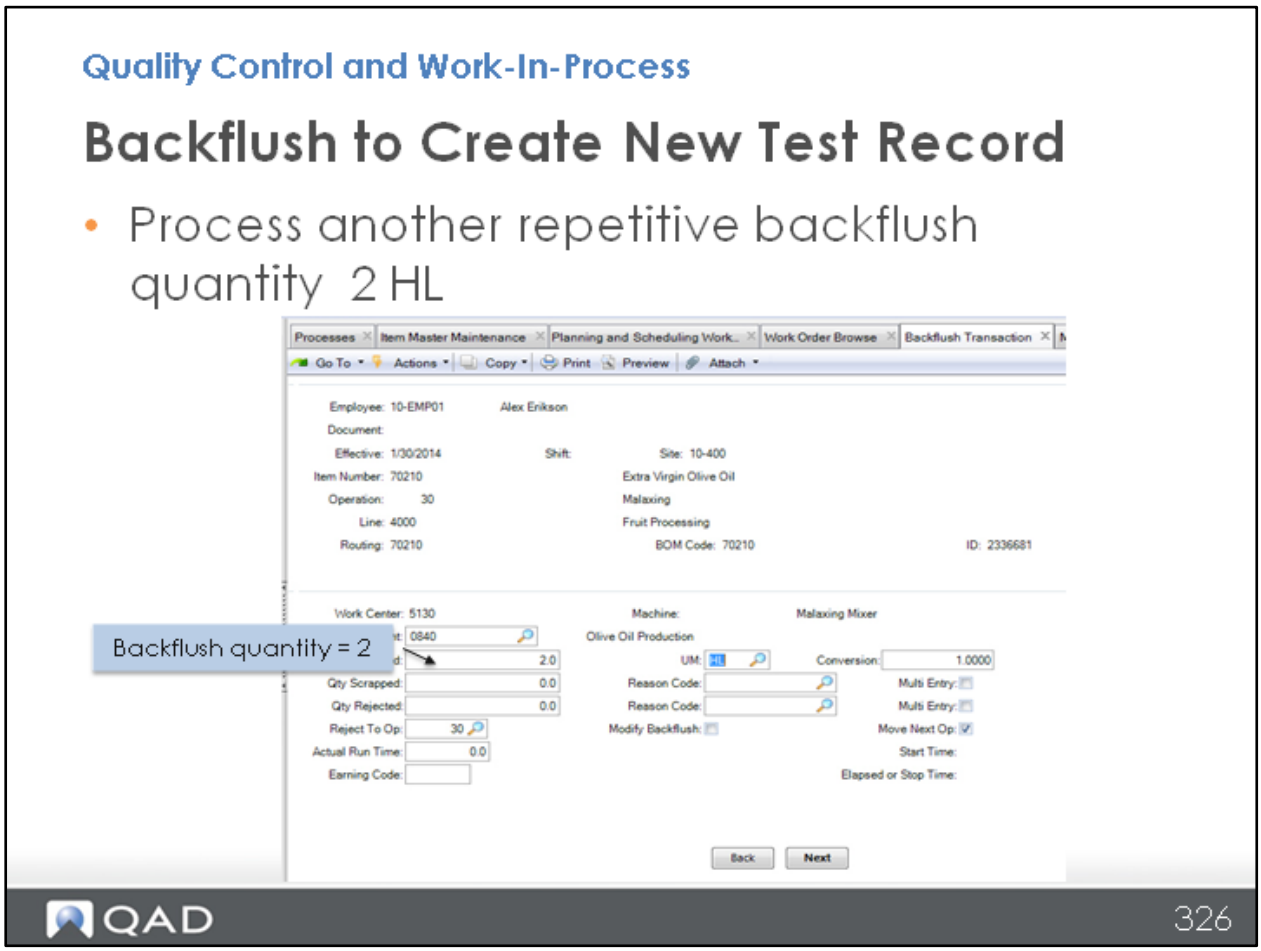
You can freeze the test quantity for a record by changing its Status. Choose a status which is appropriate to your reason for freezing the record.

Use Test Record Status to Freeze Qty



Changing the test status from open prevents the test quantity for the test record from updating.

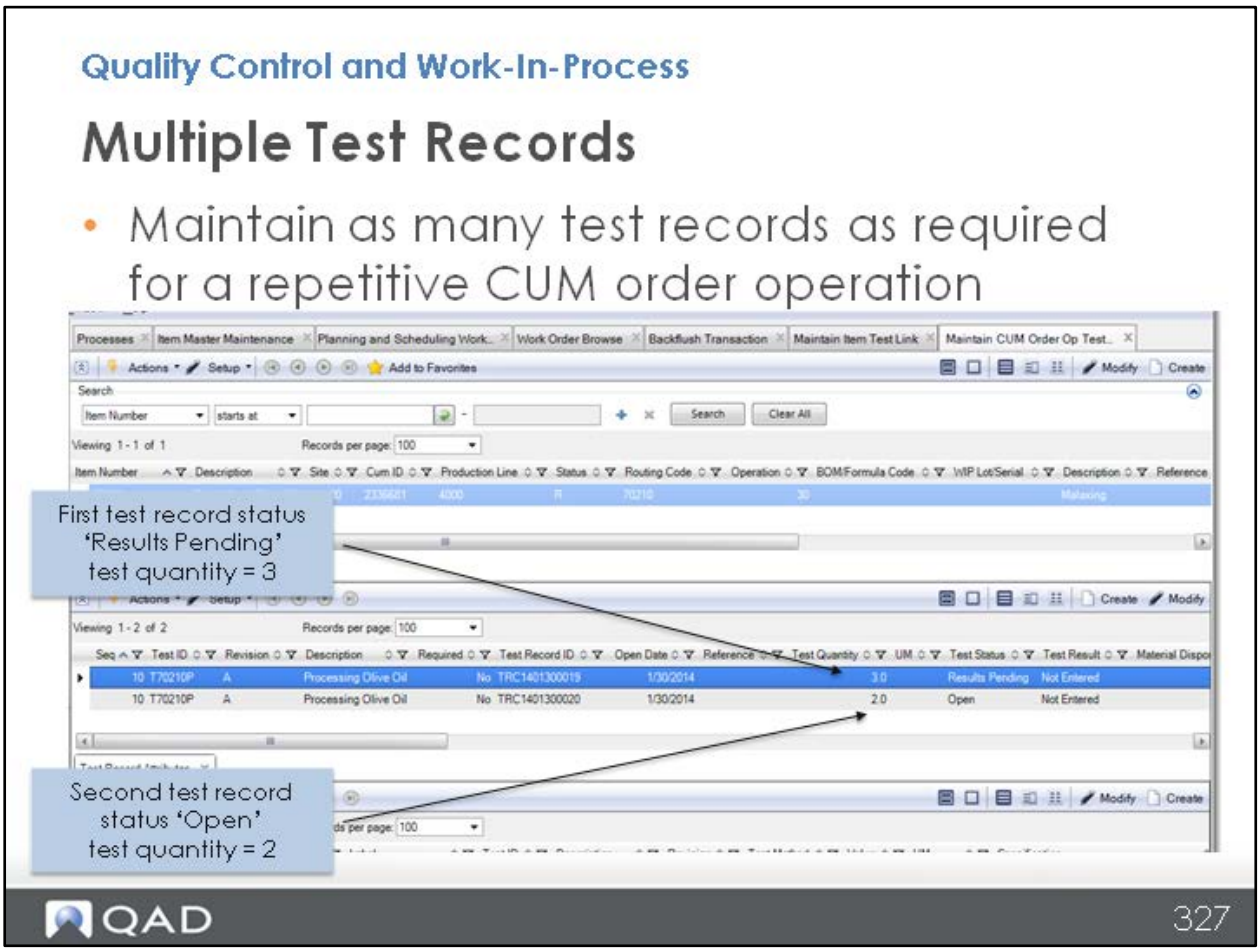
Backflush to Create New Test Record



Another backflush is processed for extra virgin olive oil.

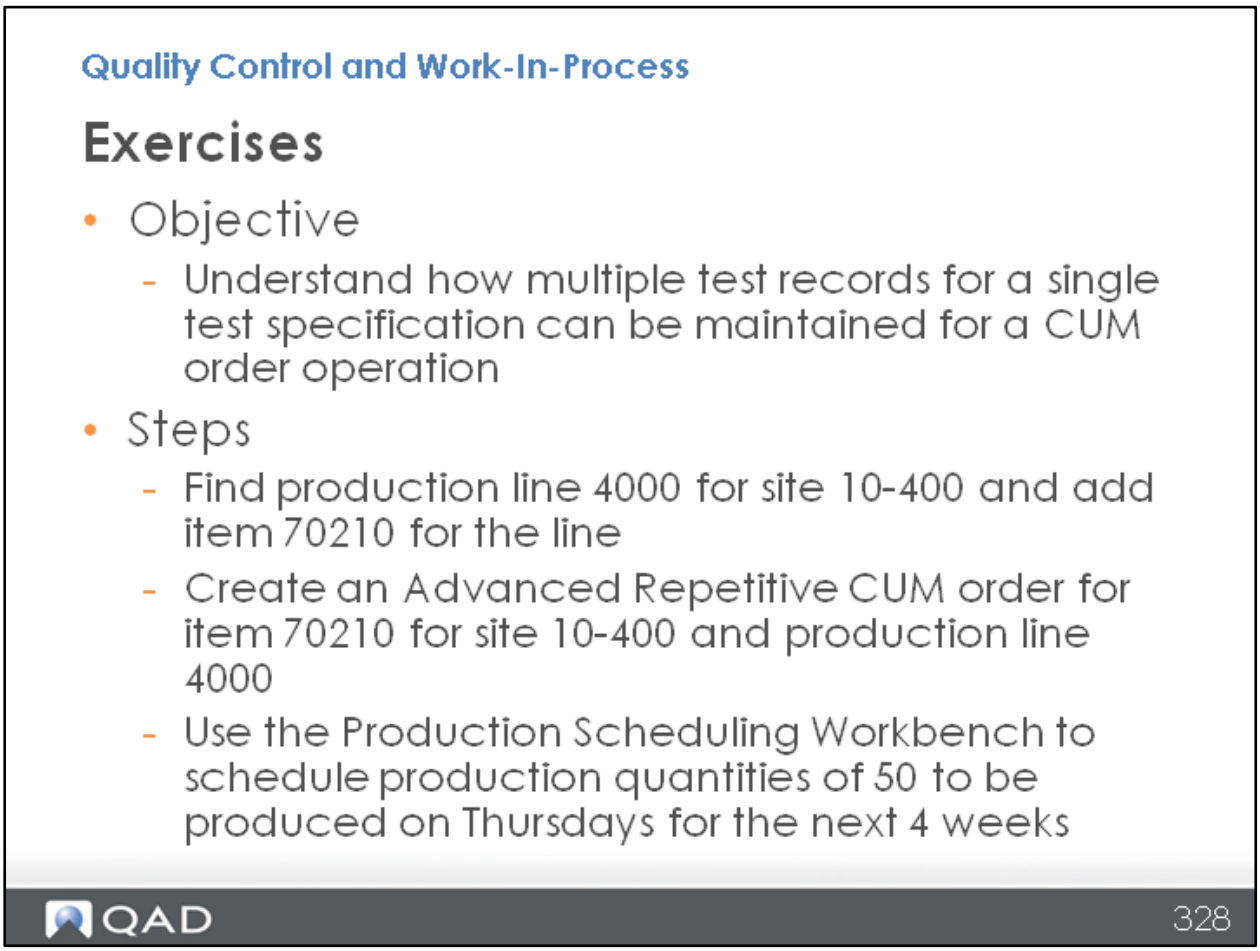
This time, the status of the test record has been changed from Open.

Multiple Test Records



Instead of updating the previous test record, a new test record has been created for the CUM ID.

Exercises


Quality Control and Work-In-Process
Exercises
Objective
Understand how multiple test records for a single test specification can be maintained for a CUM order operation
Steps
Find production line 4000 for site 10-400 and add item 70210 for the line
Create an Advanced Repetitive CUM order for item 70210 for site 10-400 and production line 4000
Use the Production Scheduling Workbench to schedule production quantities of 50 to be produced on Thursdays for the next 4 weeks
QAD
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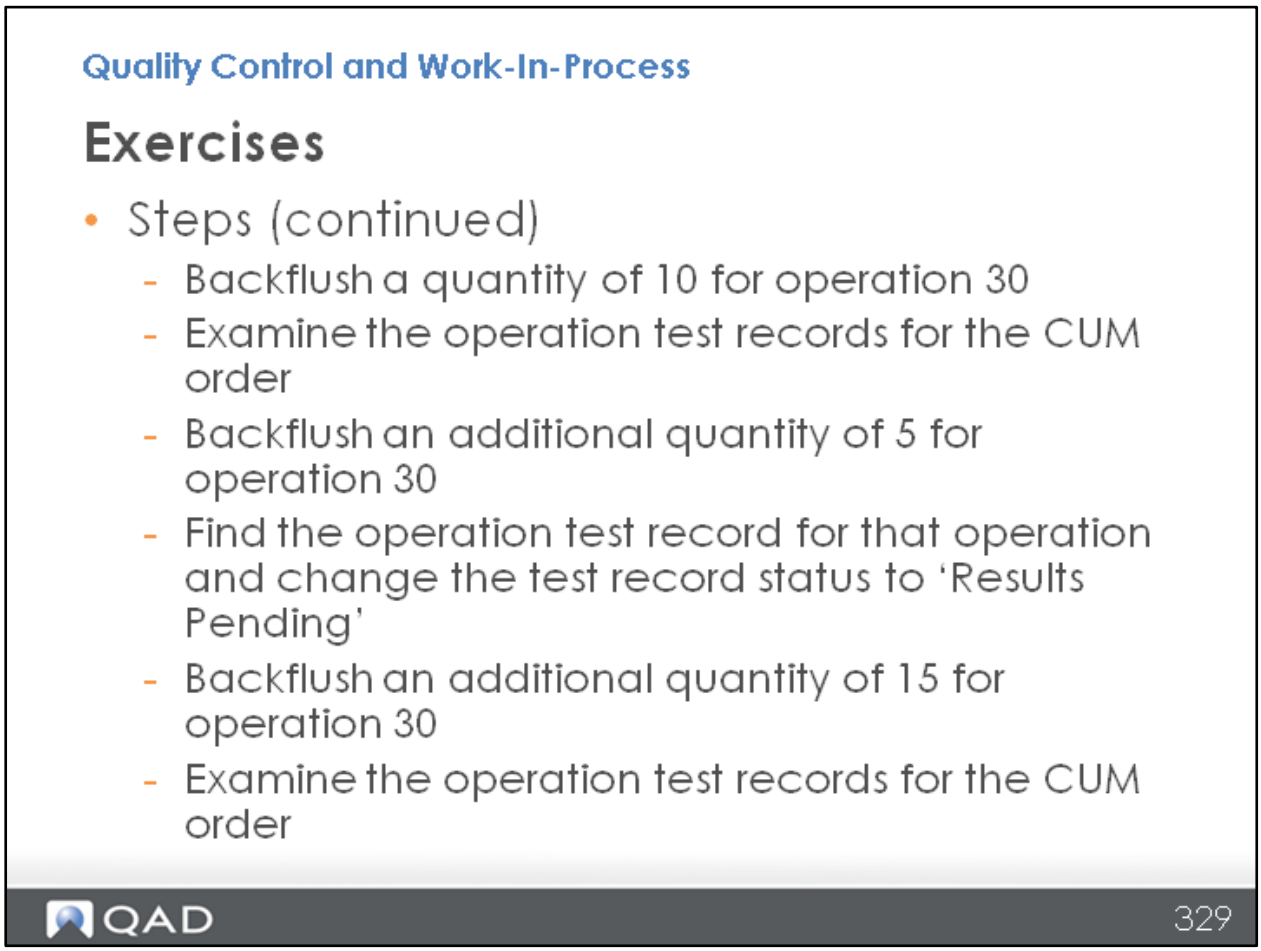
Exercises


Quality Control and Work-In-Process
Exercises
• Steps (continued)
- Backflush a quantity of 10 for operation 30
- Examine the operation test records for the CUM order
- Backflush an additional quantity of 5 for operation 30
- Find the operation test record for that operation and change the test record status to 'Results Pending'
- Backflush an additional quantity of 15 for operation 30
- Examine the operation test records for the CUM order
QAD
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CHAPTER 11

Quality Control and Make-to-Order

Quality Control and Make-to-Order

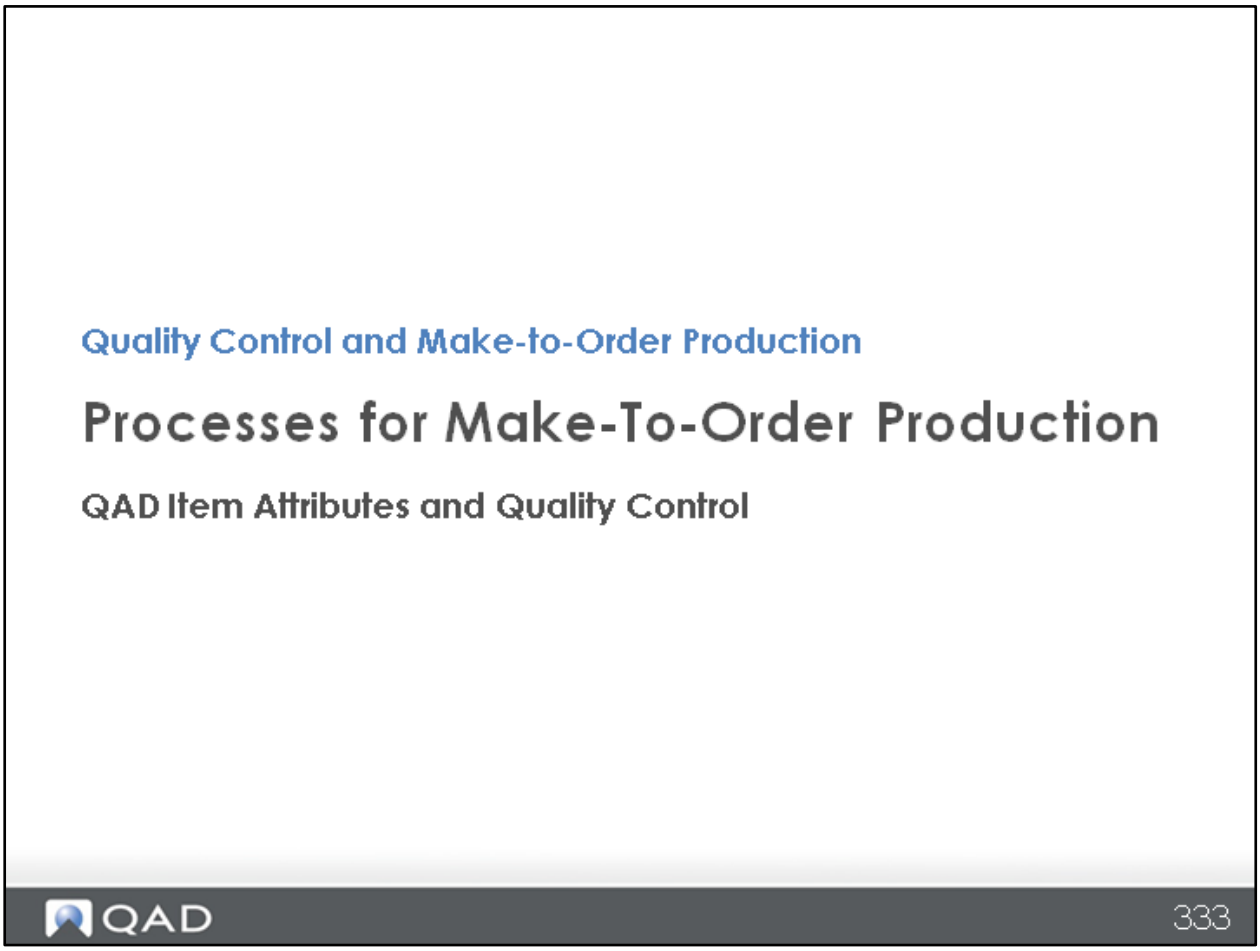
Lesson Objectives

Challenges with Make-to-Order

This section of training covers how the quality control process covers make-to-order production methods.

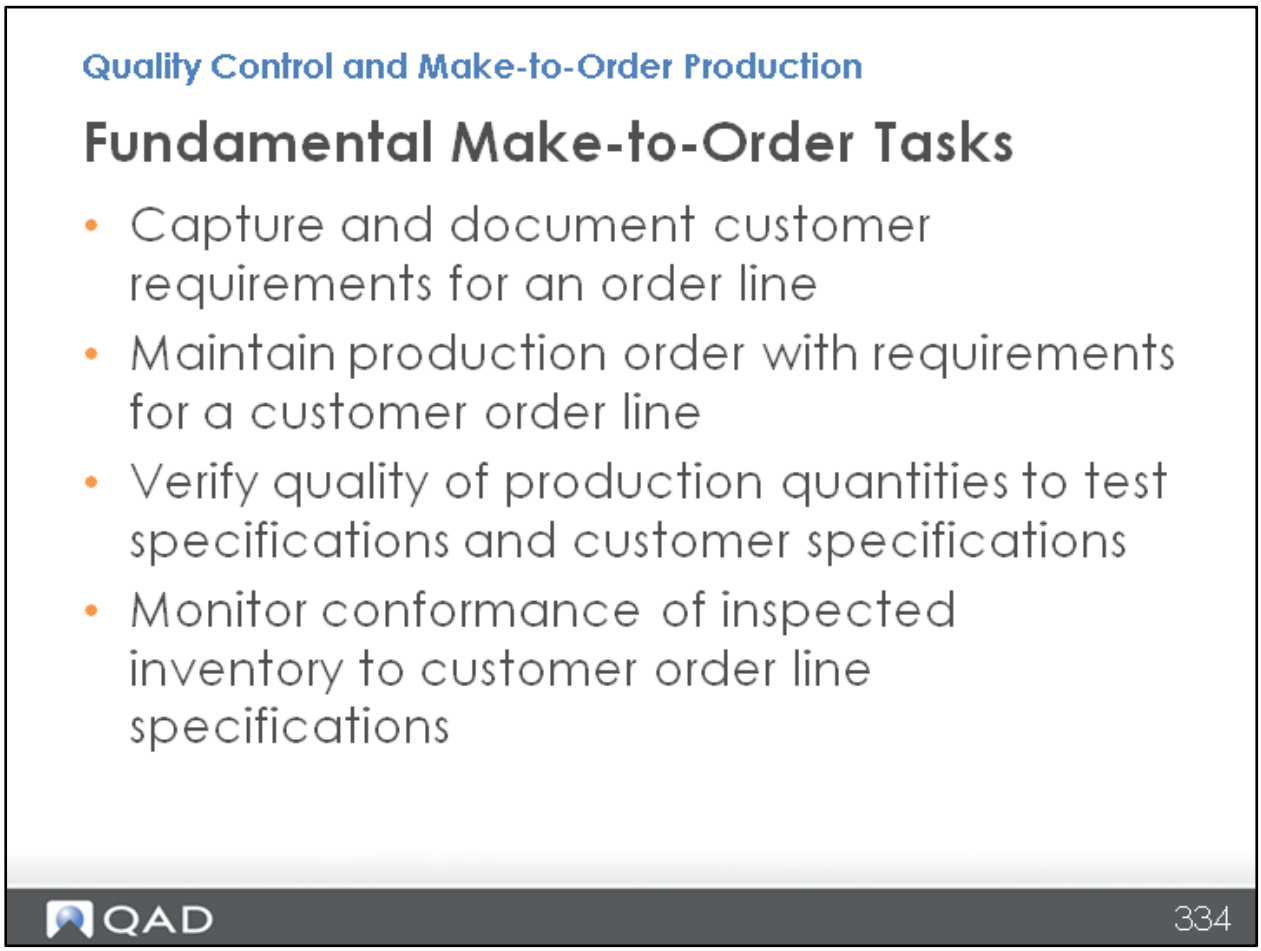
The overall challenges of Make-to-Order involve the difficulty of meeting the unique specifications of customers.
QAD EE's quality control functionality offers options to meet these needs.

Processes for Make-To-Order Production

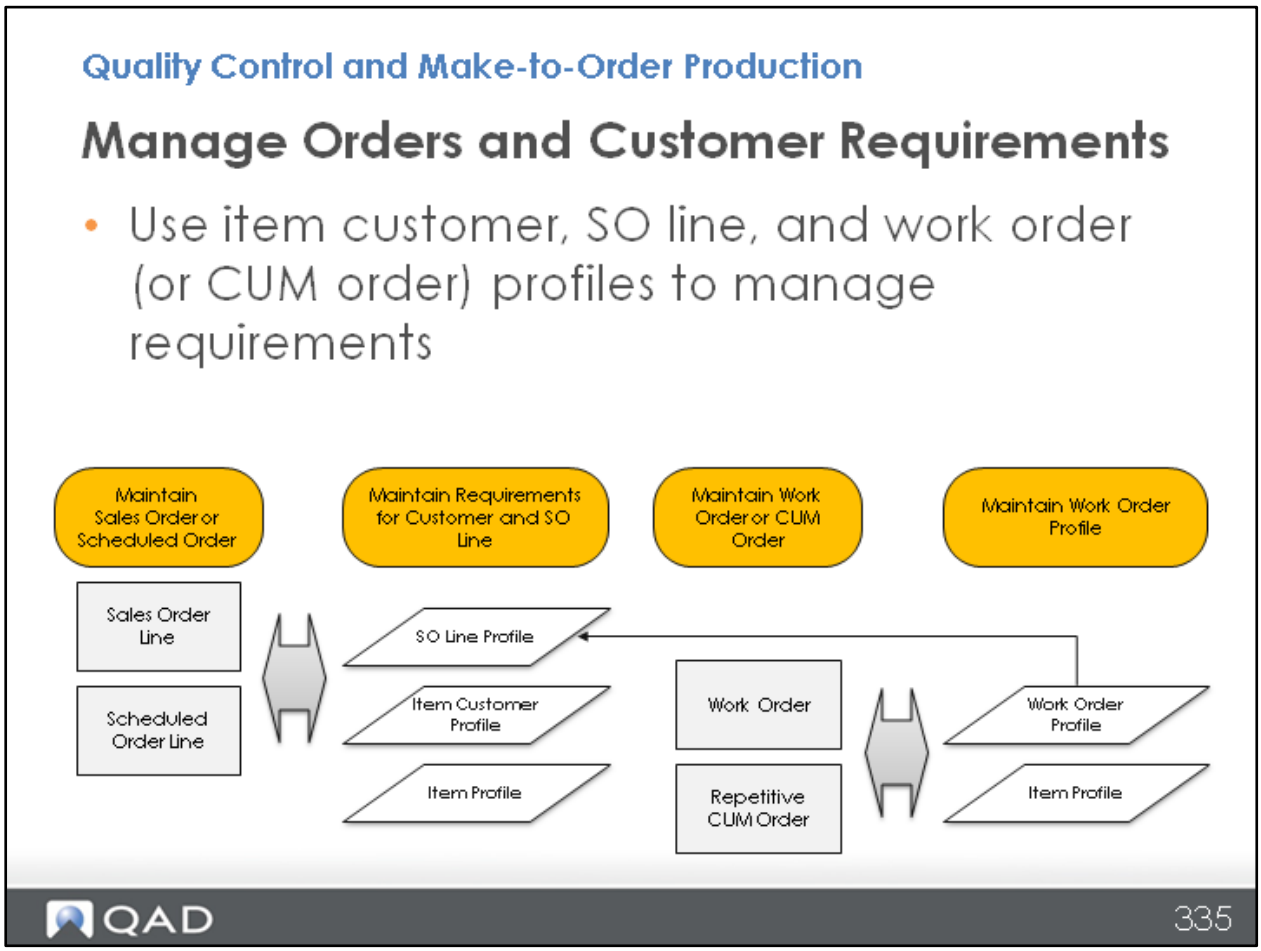


The following processes show how functions can be used to support make-to-order manufacturing

Fundamental Make-to-Order Tasks



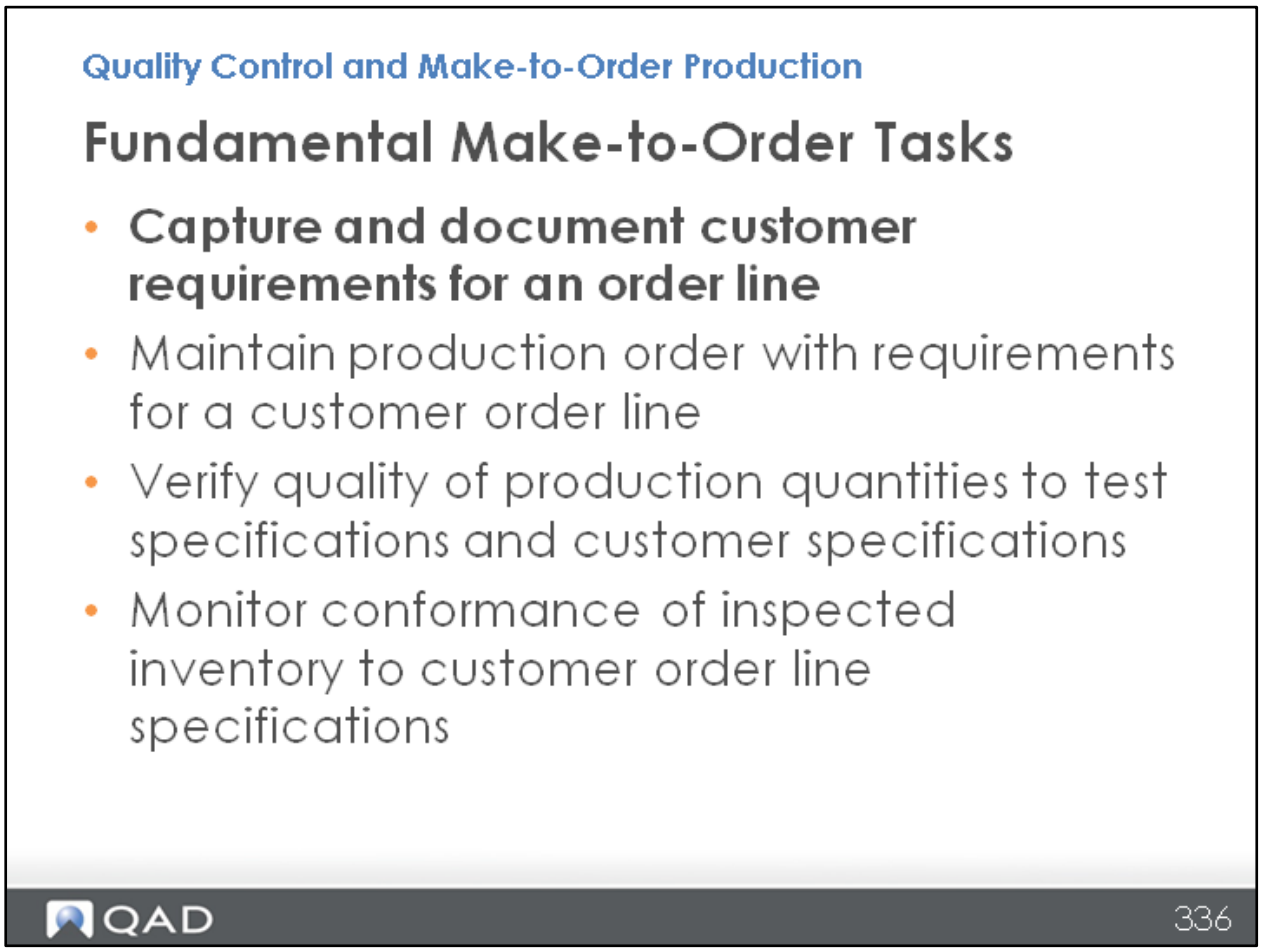
Manage Orders and Customer Requirements



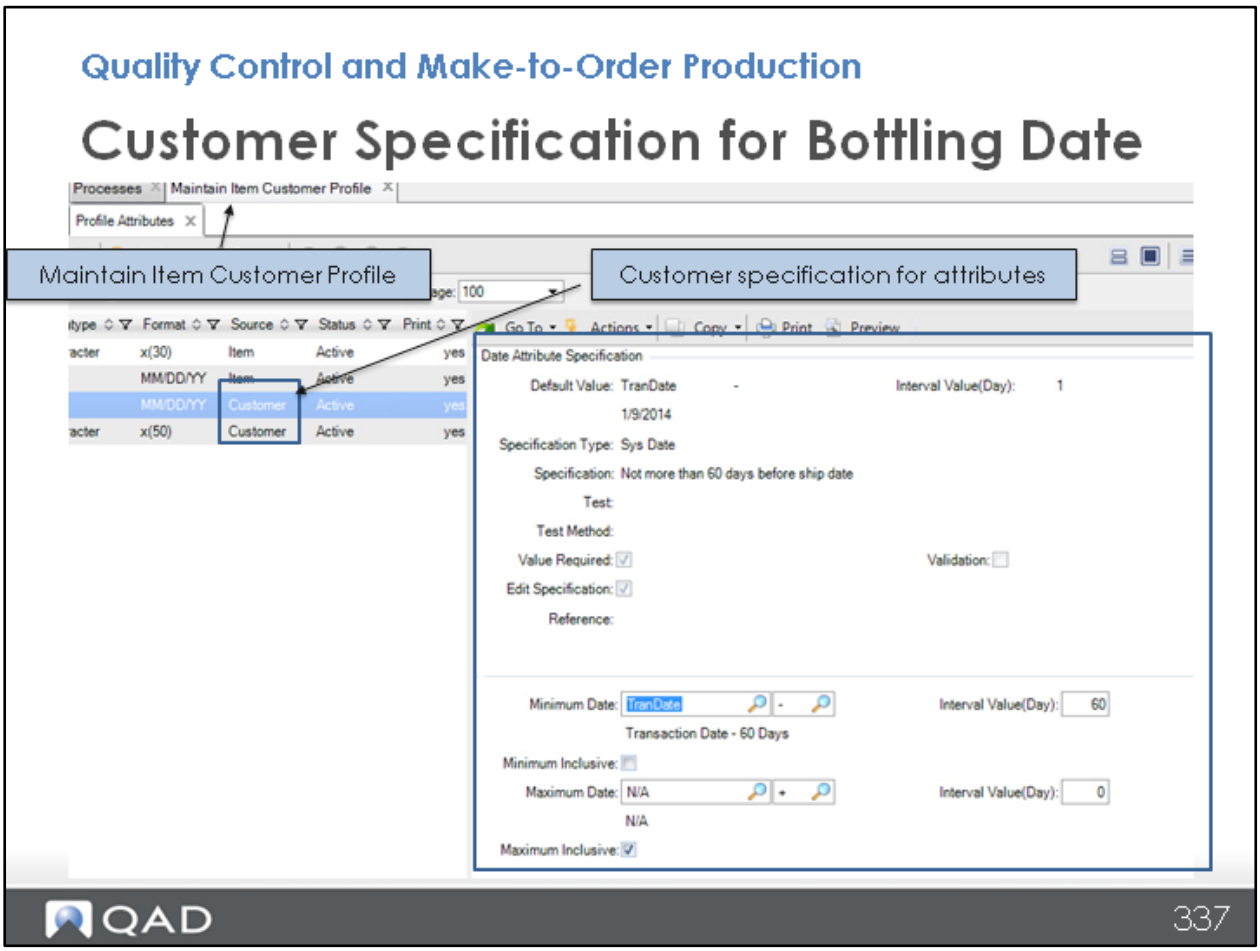
There are three groups of profiles which assist you in managing customer requirements.

The item customer profile deals generally with specifications unique to a customer. The SO line and scheduled order line profiles deal with specifications unique to a sales transaction. Finally, work order and CUM order profiles deal with specifications unique to production orders.

Fundamental Make-to-Order Tasks



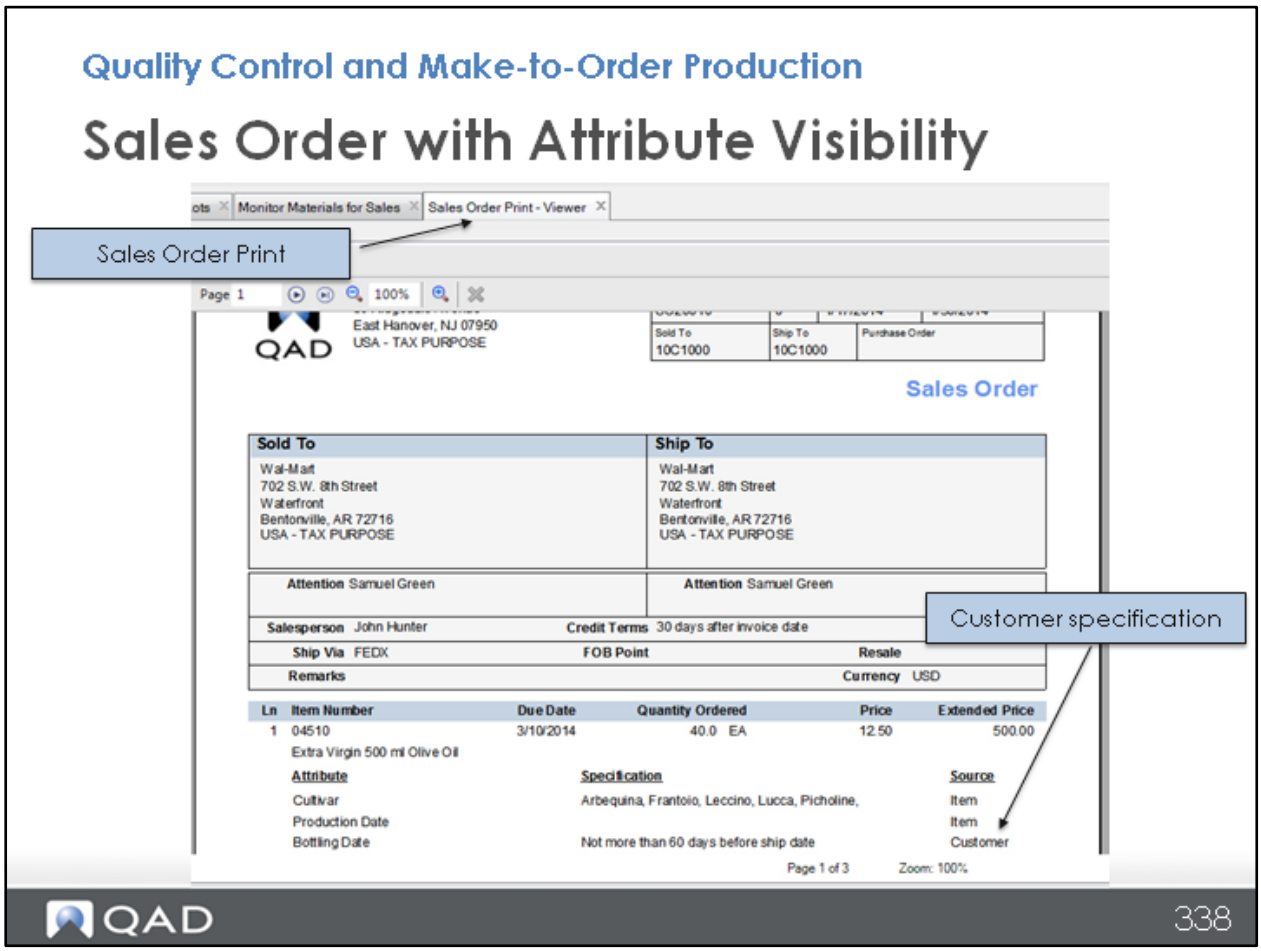
Customer Specification for Bottling Date



The above graphic shows an attribute within the Maintain Item Customer Profile browse collection.

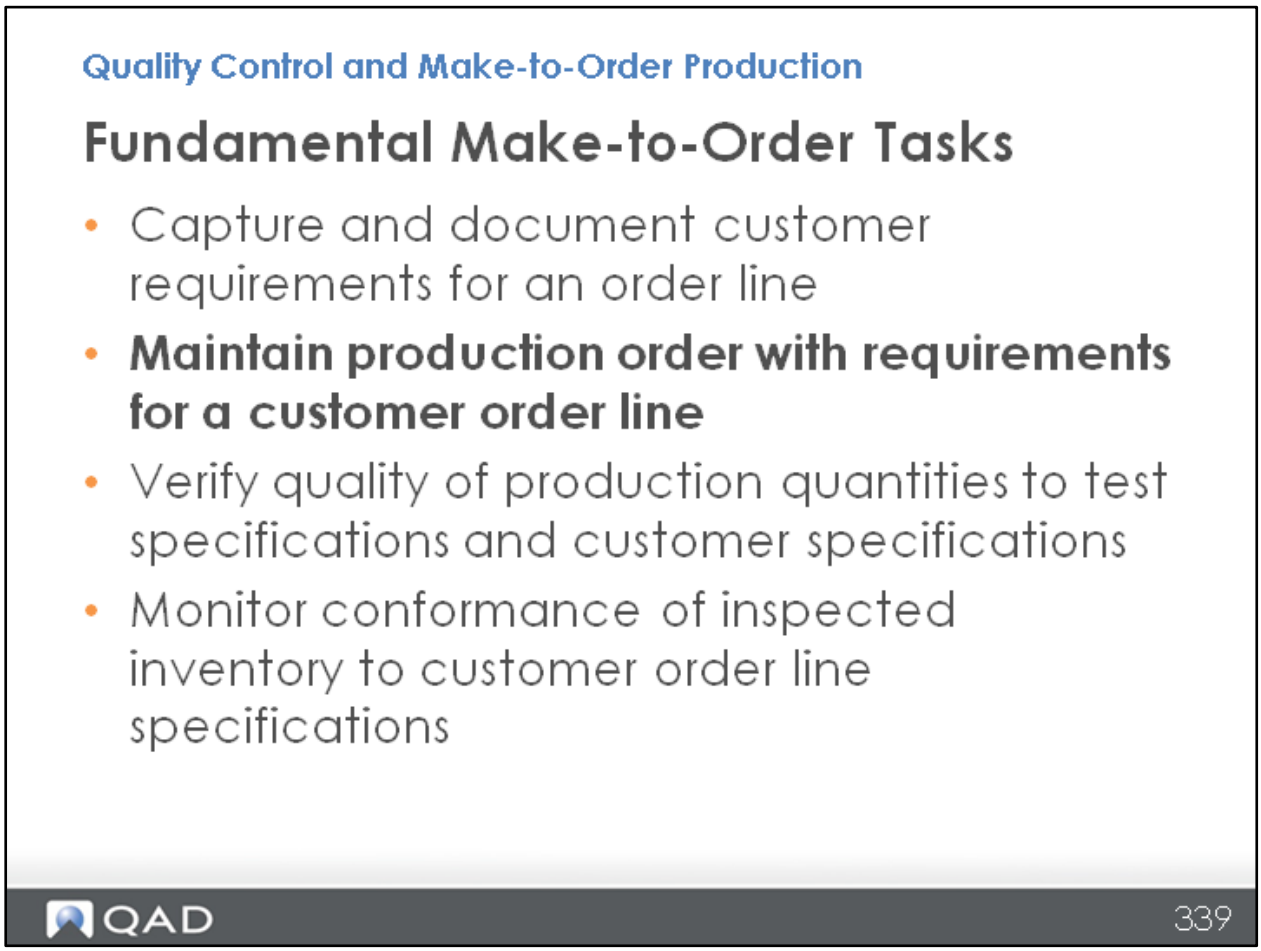
This attribute has a specification unique to that customer.

Sales Order with Attribute Visibility

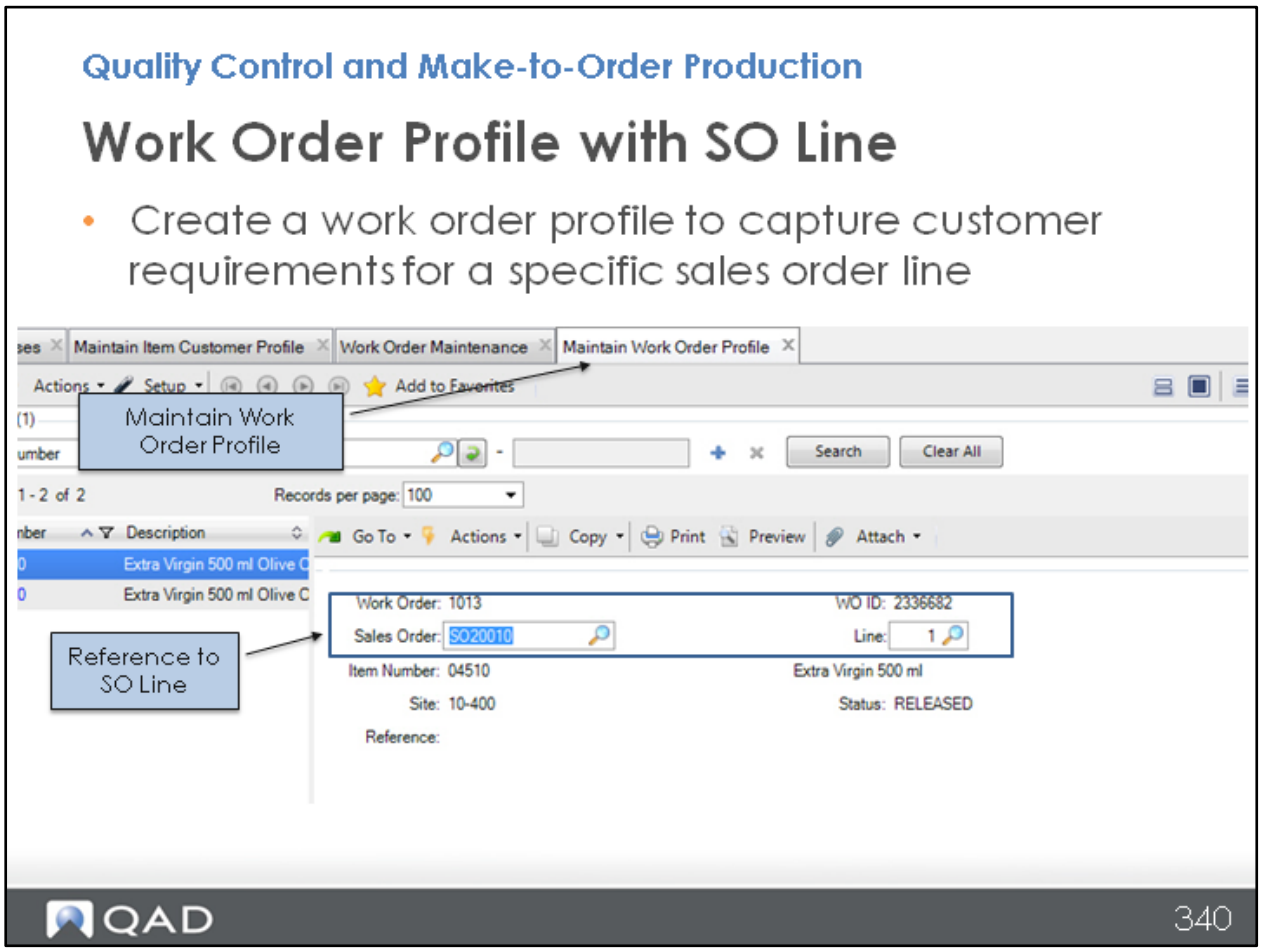


To meet the attribute needs of customers, QAD EE allows you to print attributes on sales orders. This provides documented notification of attribute data within your existing documentation infrastructure.

Fundamental Make-to-Order Tasks



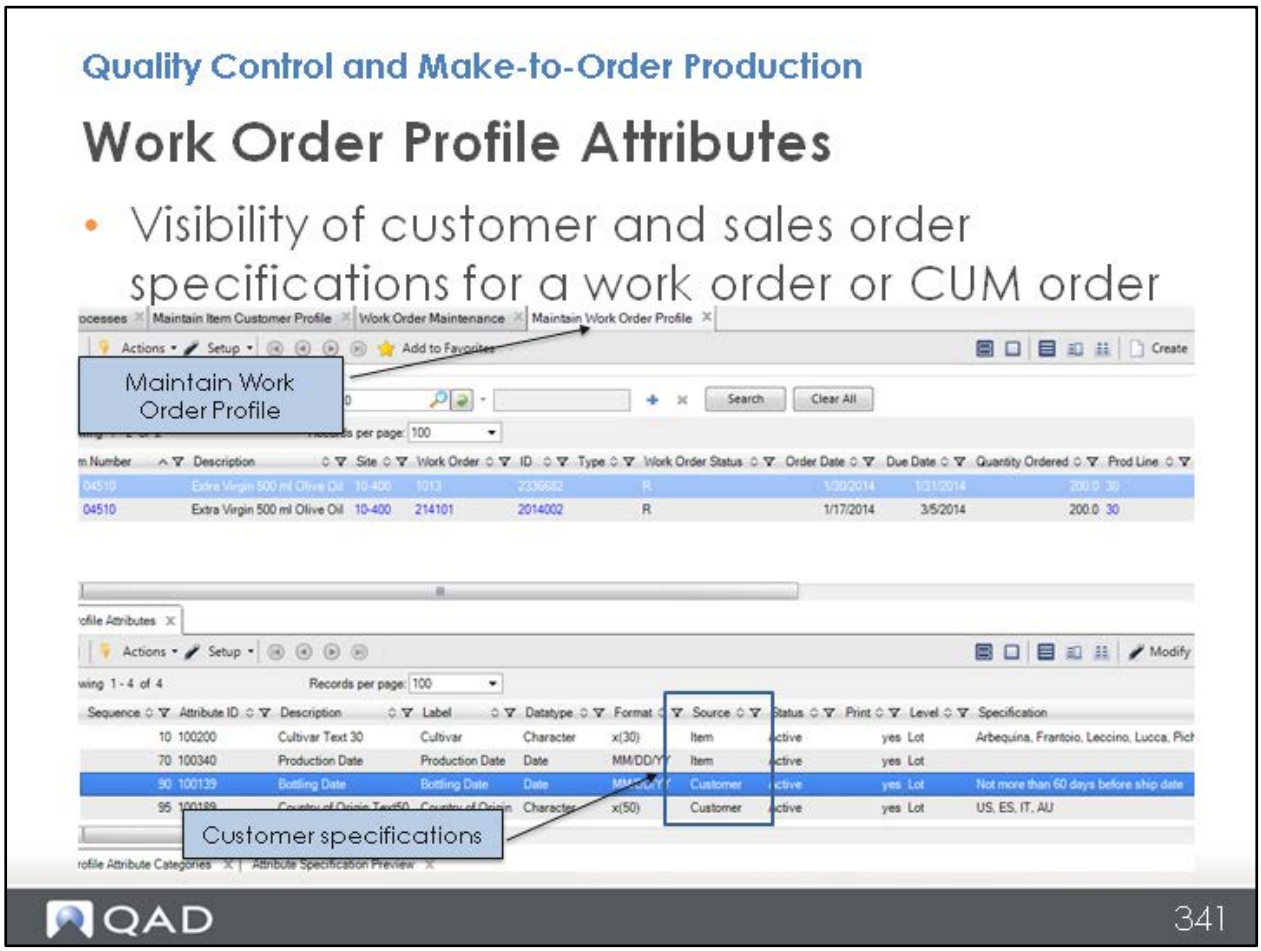
Work Order Profile with SO Line



Work order profiles can be linked to a specific sales order line.

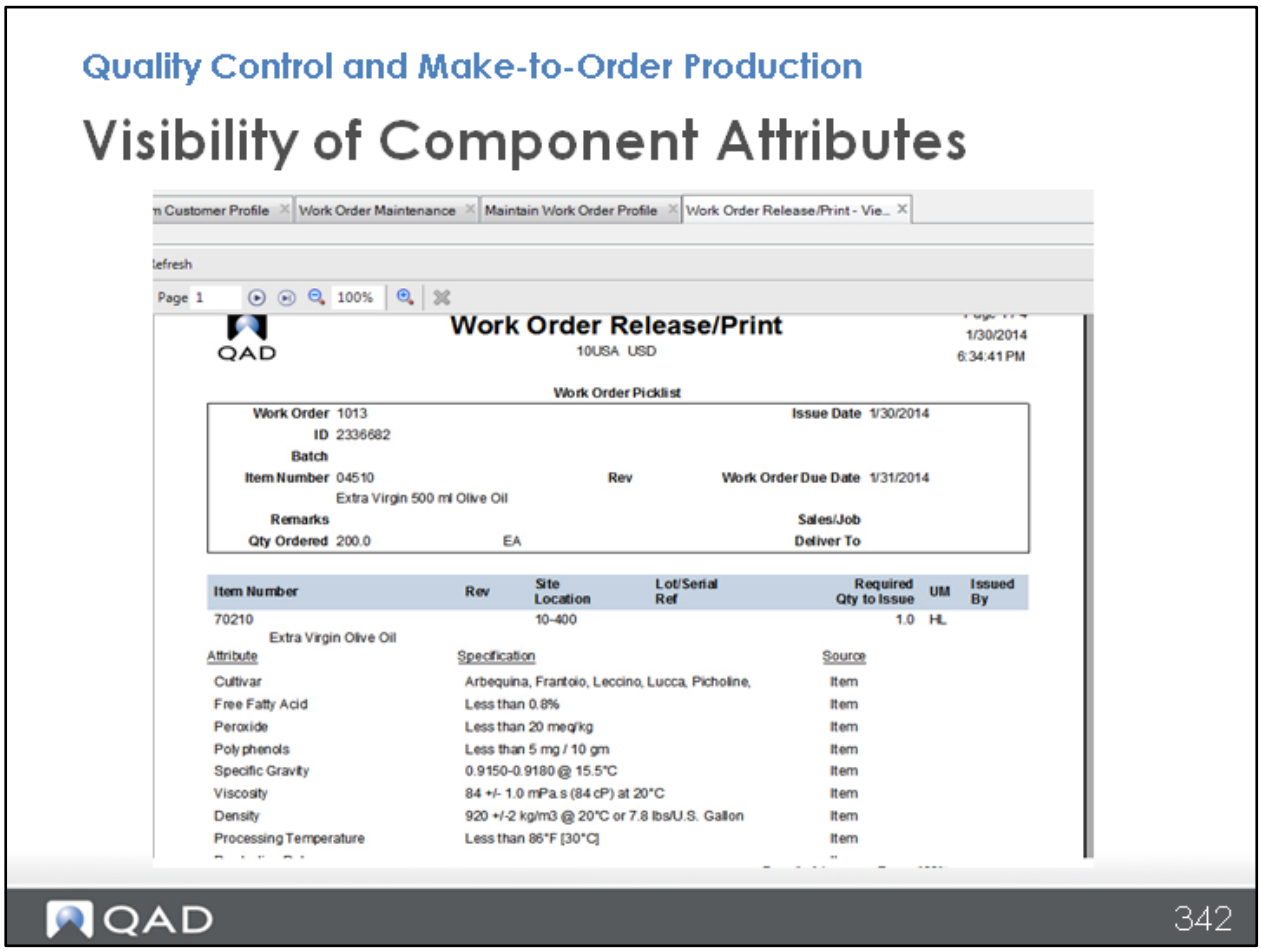
This connects the attributes on the sales order, as well as those from the customer named in the sales order.

Work Order Profile Attributes



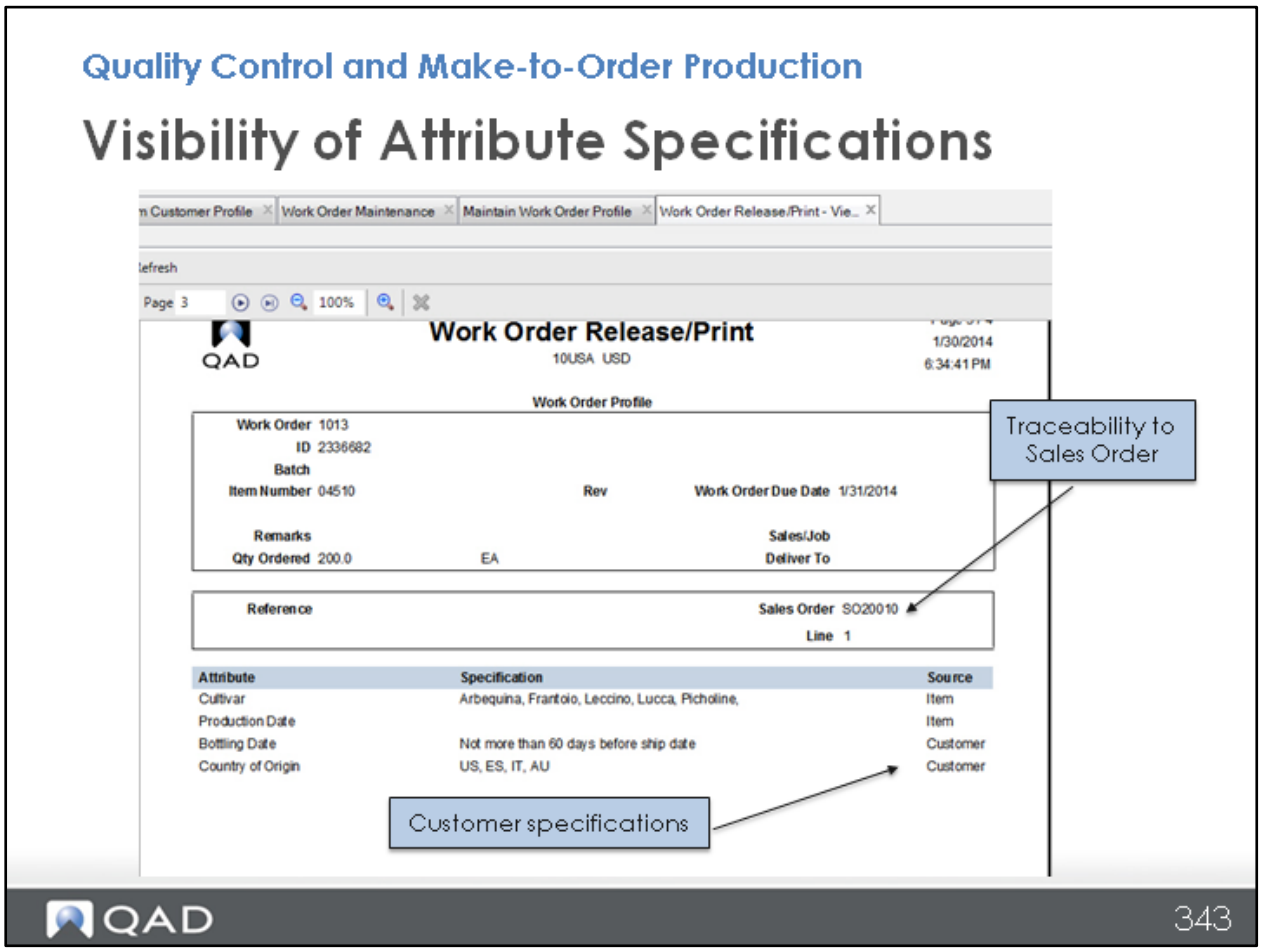
The graphic above demonstrates a work order linked to a sales order. Observe that several attributes have a Source value of Customer. This indicates that the customer named in the sales order has additional specifications.

Visibility of Component Attributes



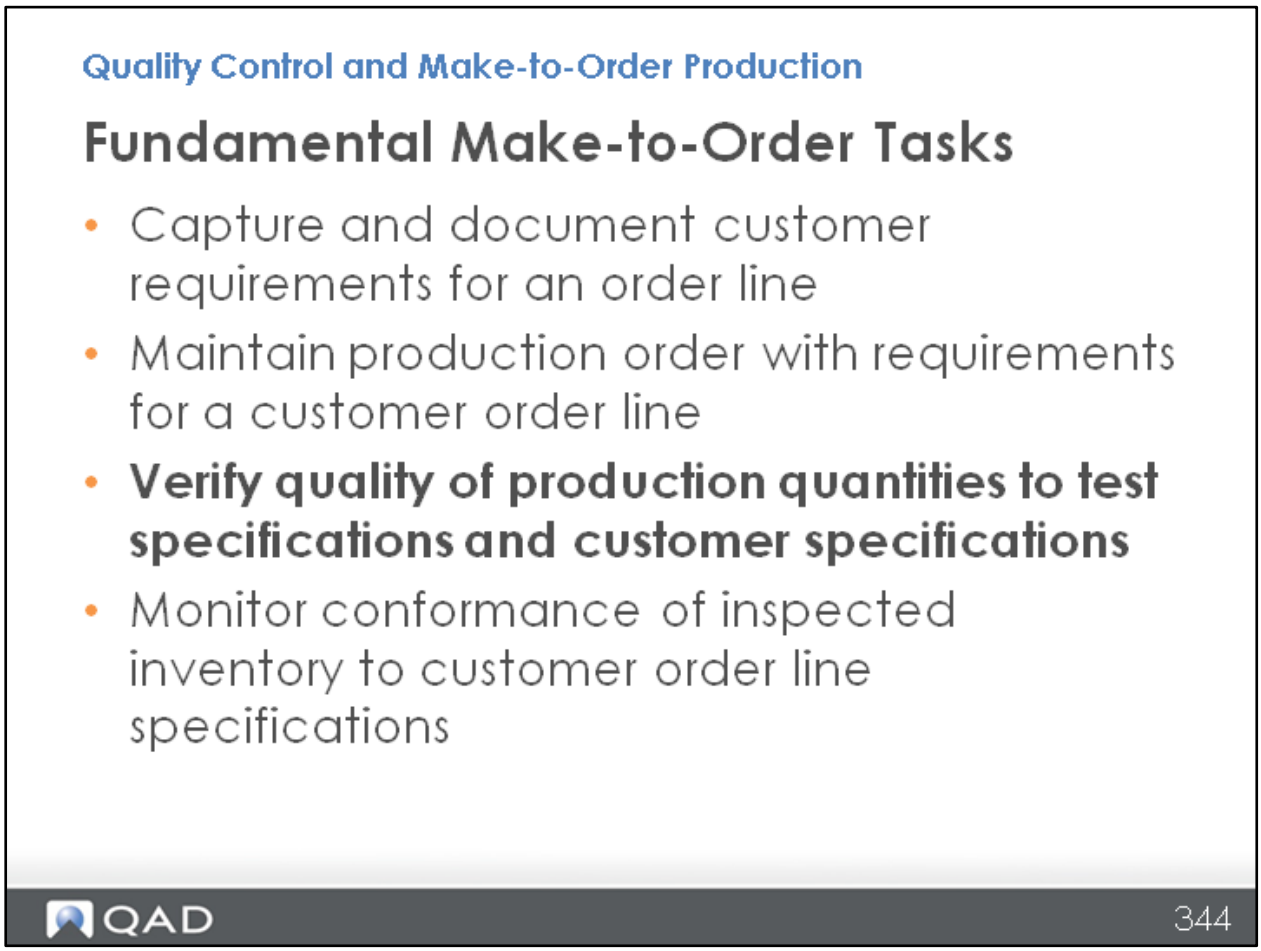
As with sales orders, attribute data can be printed on work orders. This allows you to keep attribute data visible within your existing documentation flow.

Visibility of Attribute Specifications

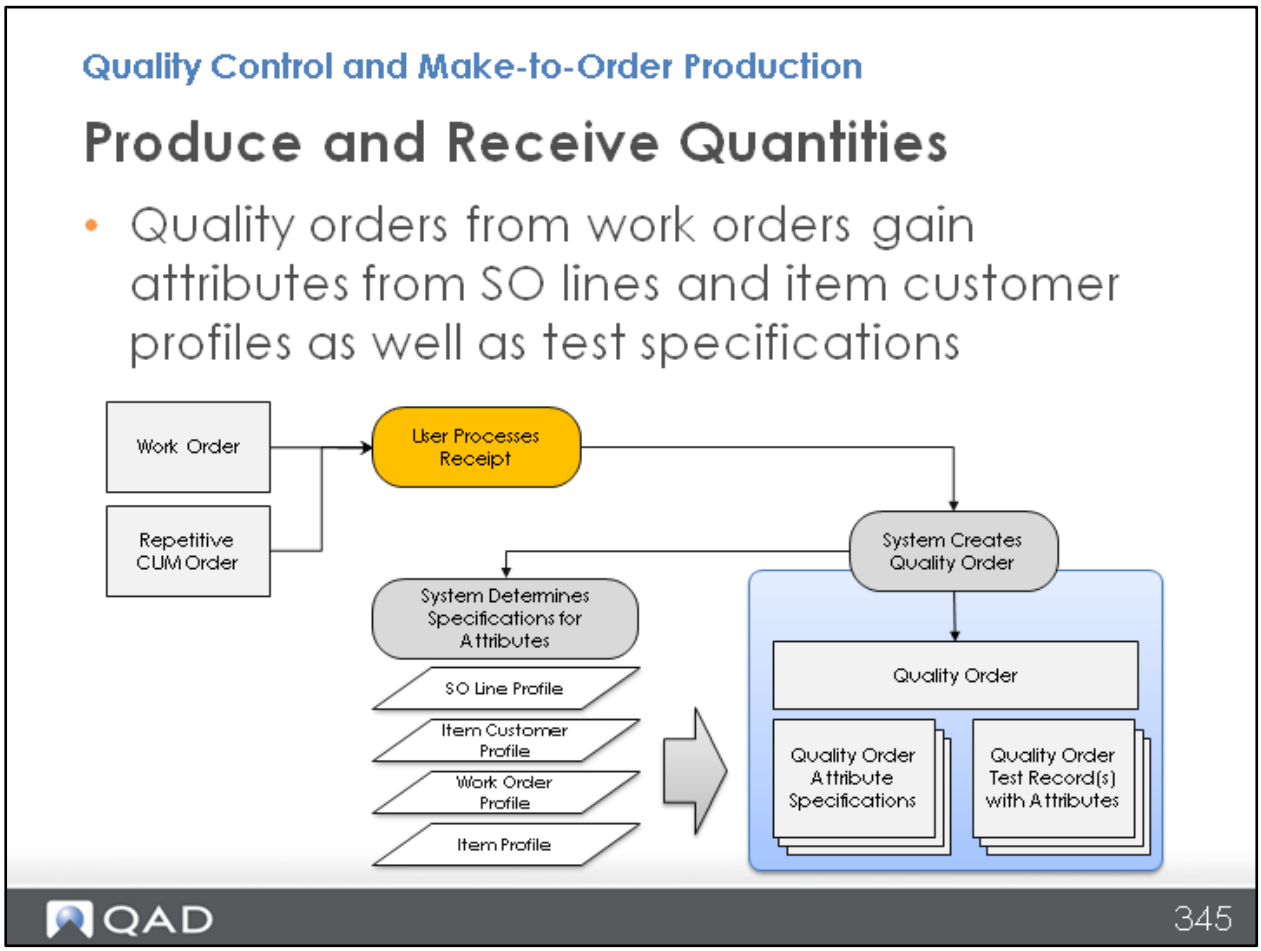


Attributes can be selected and printed both for components as well as final products.

Fundamental Make-to-Order Tasks

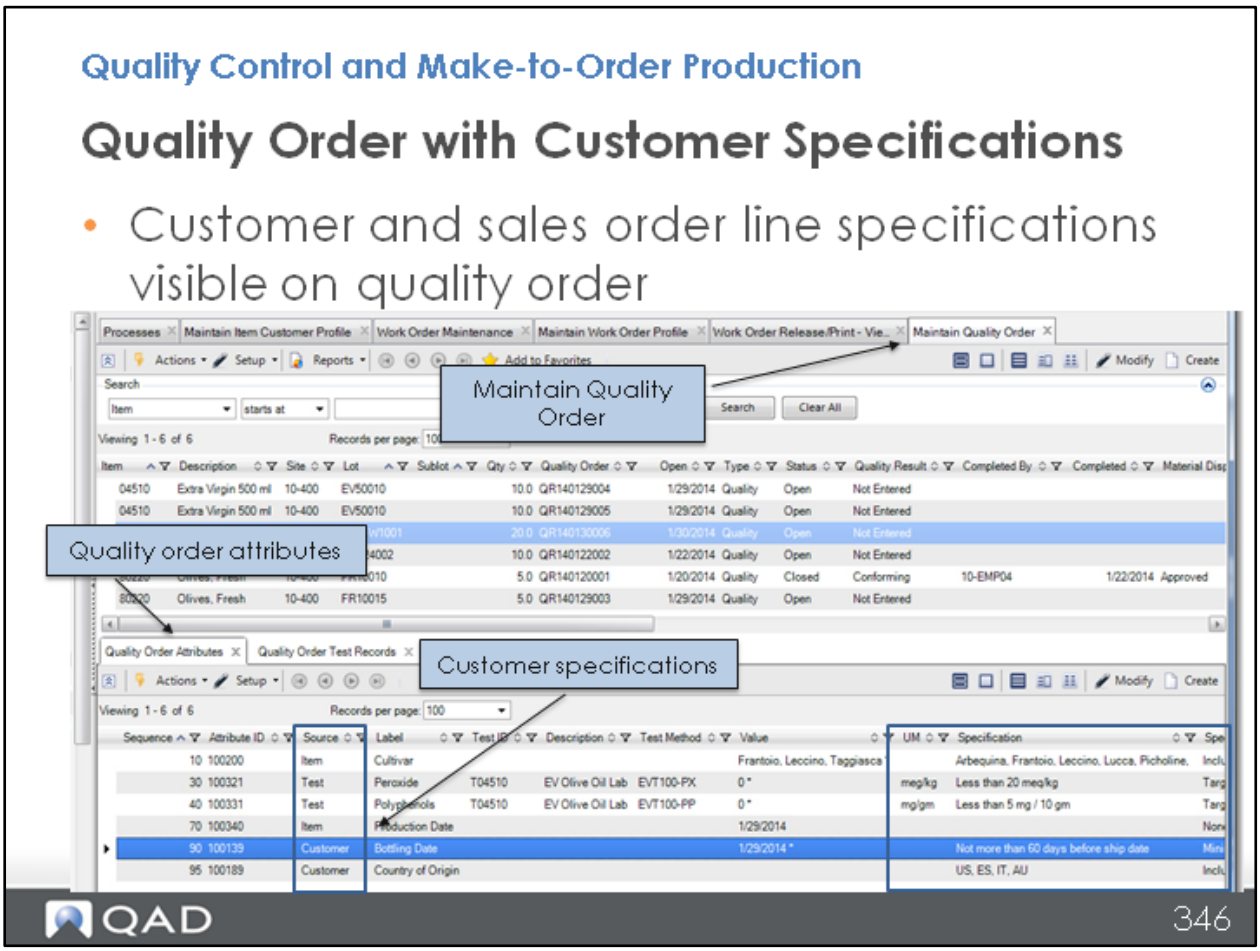


Produce and Receive Quantities



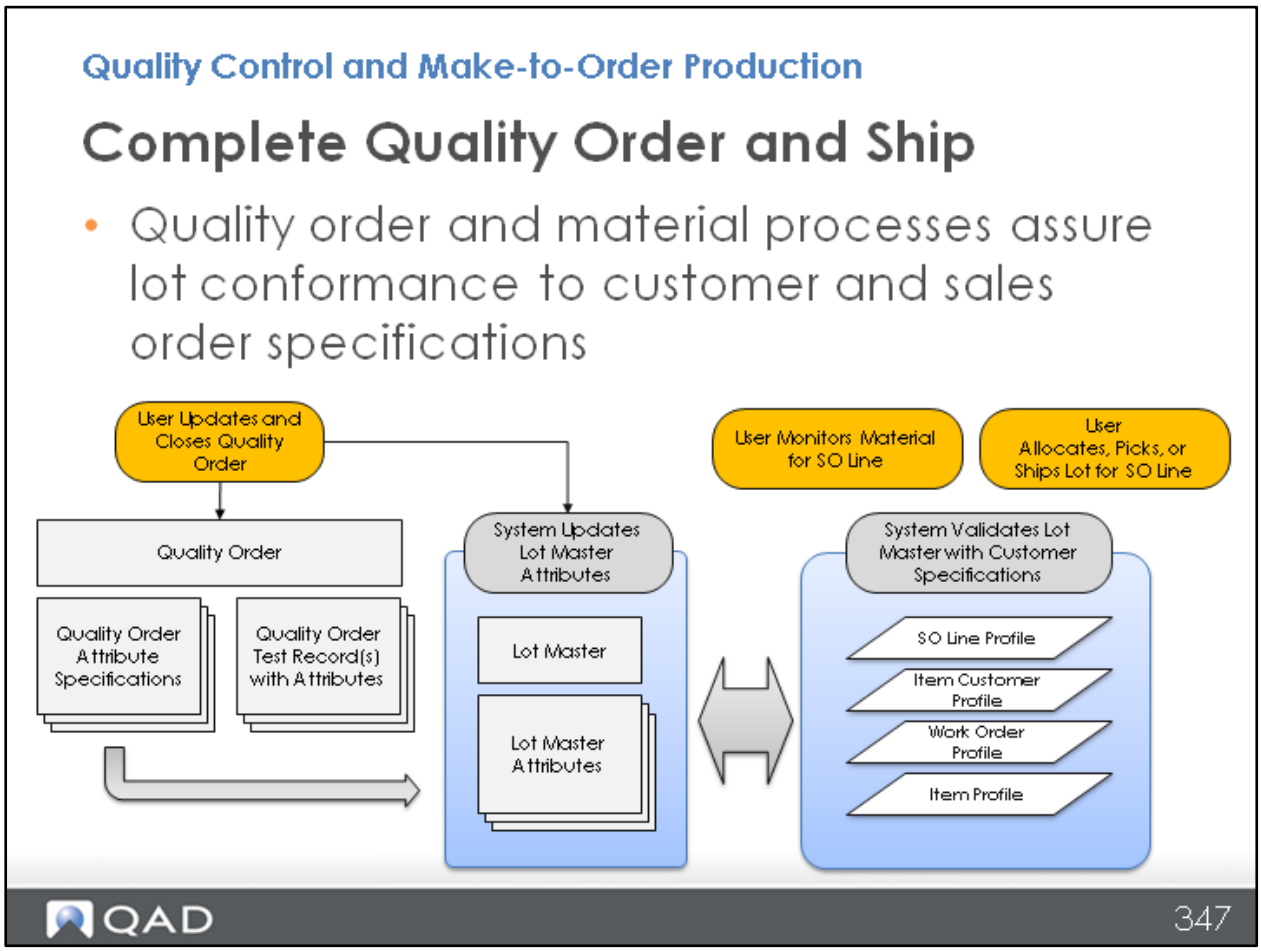
After receiving a lot from production which triggers a quality order, the quality order gains attributes. These come from the test specification as well as from matching profiles.

Quality Order with Customer Specifications



The above graphic demonstrates a quality order with multiple attribute sources. Observe that the Source values come from item profiles, test specifications, and item customer profiles.

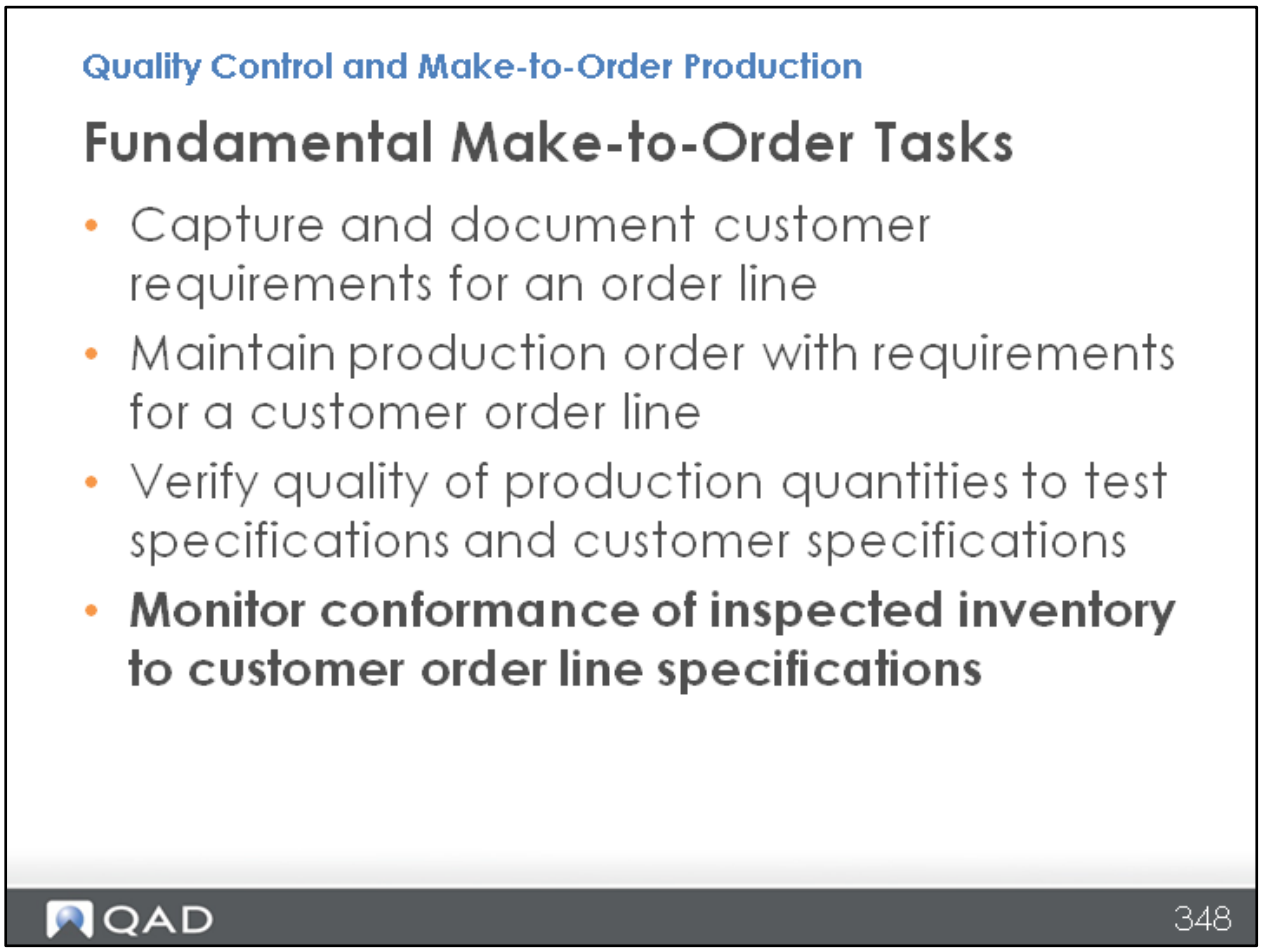
Complete Quality Order and Ship



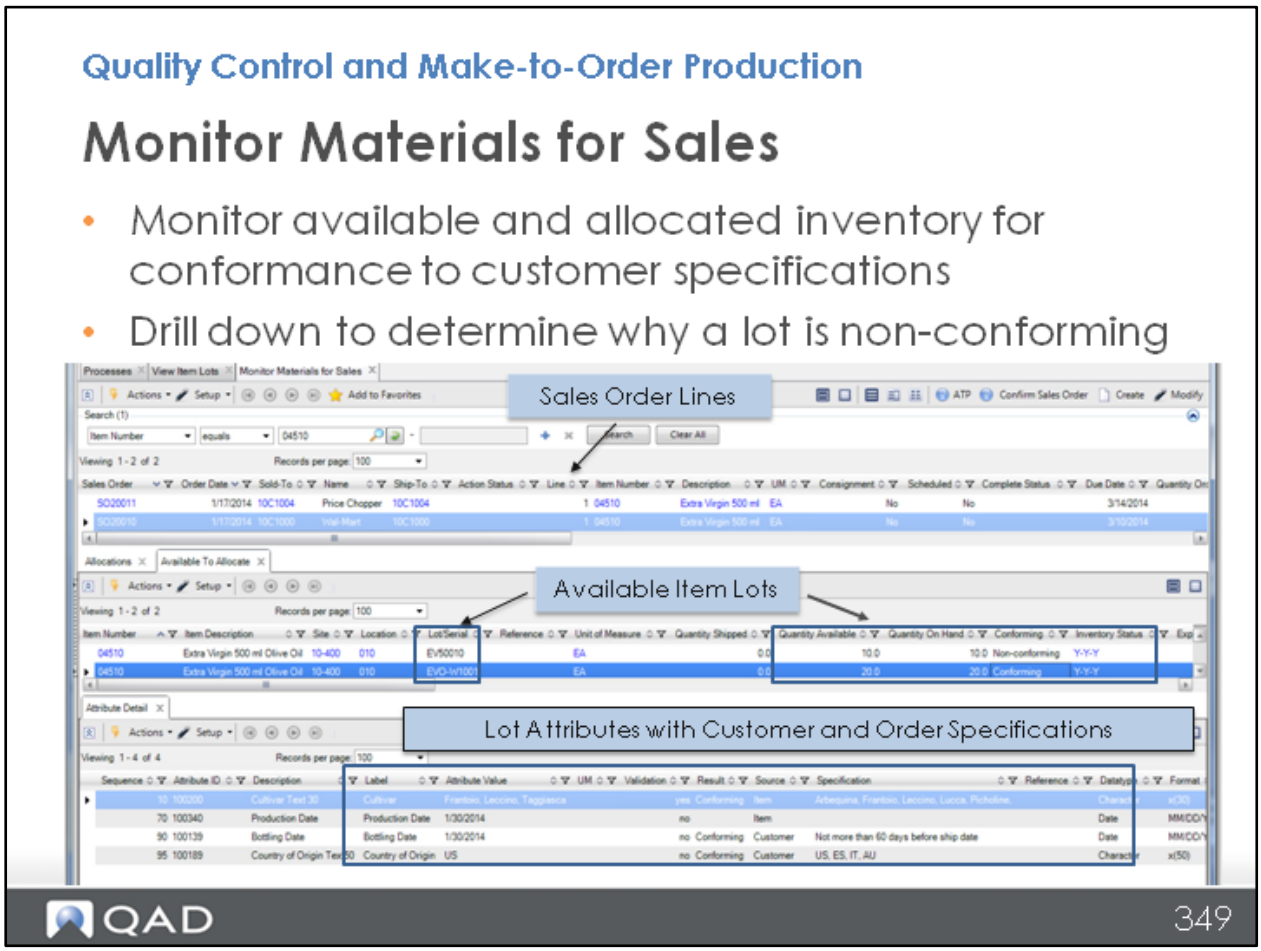
In addition the multiple attribute sources that QAD EE supports, it also supports unique customer specifications by providing options for monitoring materials.

After closing a quality order for a sales order, the user must validate that the right materials available and ship them.

Fundamental Make-to-Order Tasks

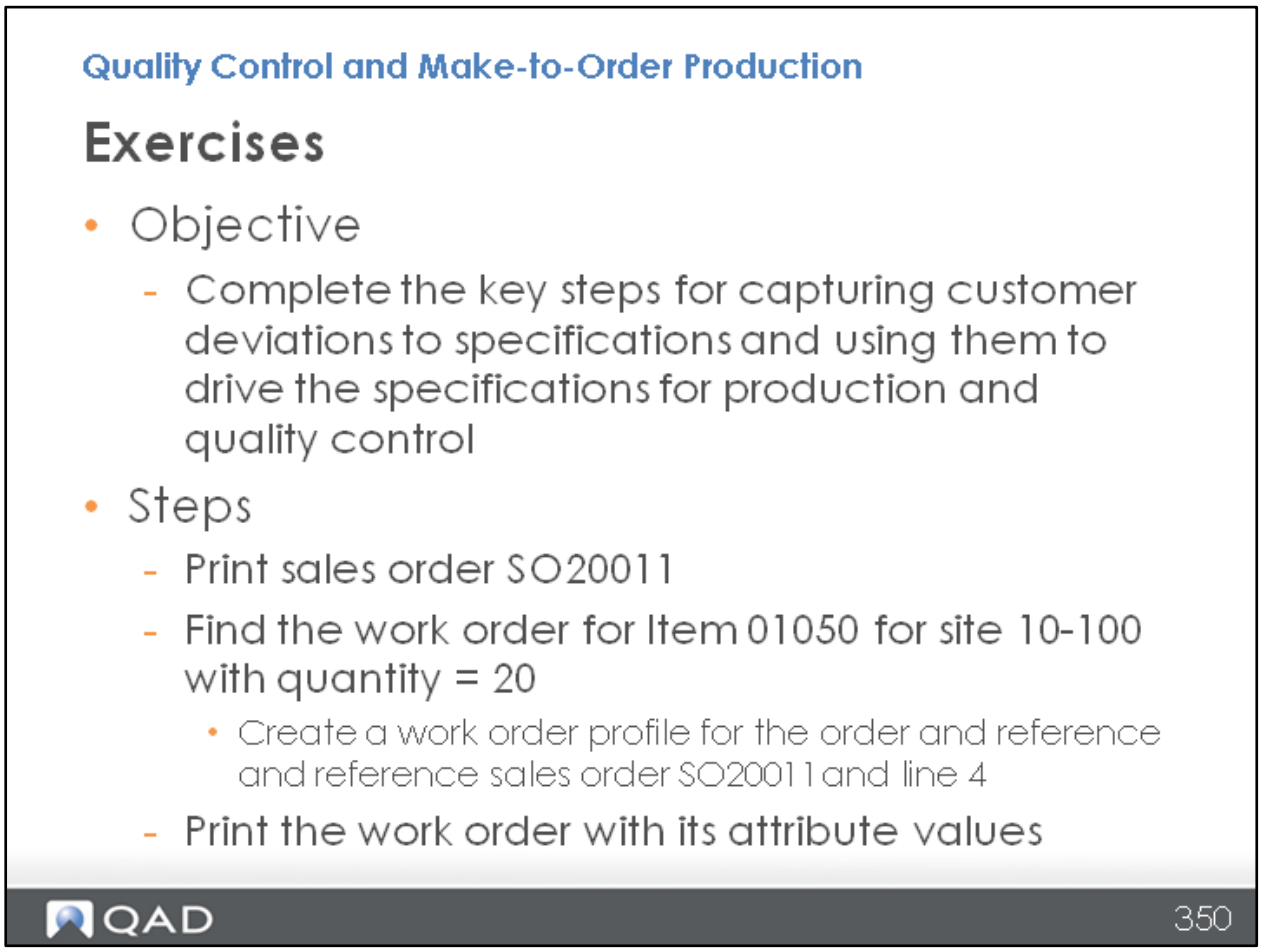


Monitor Materials for Sales



The Monitor Materials for Sales browse collection provides a more thorough view of materials for orders than View Item Lots. The conformance of attributes calculates dynamically based on the current values and specifications which relate to these attributes.
Sales orders are organized here to provide insight into current available allocations. Use this browse collection to plan shipping allocations.

Exercises


Quality Control and Make-to-Order Production
Exercises
Objective
Complete the key steps for capturing customer deviations to specifications and using them to drive the specifications for production and quality control
Steps
Print sales order SO20011
Find the work order for Item 01050 for site 10-100 with quantity = 20
Create a work order profile for the order and reference and reference sales order SO20011 and line 4
Print the work order with its attribute values
QAD
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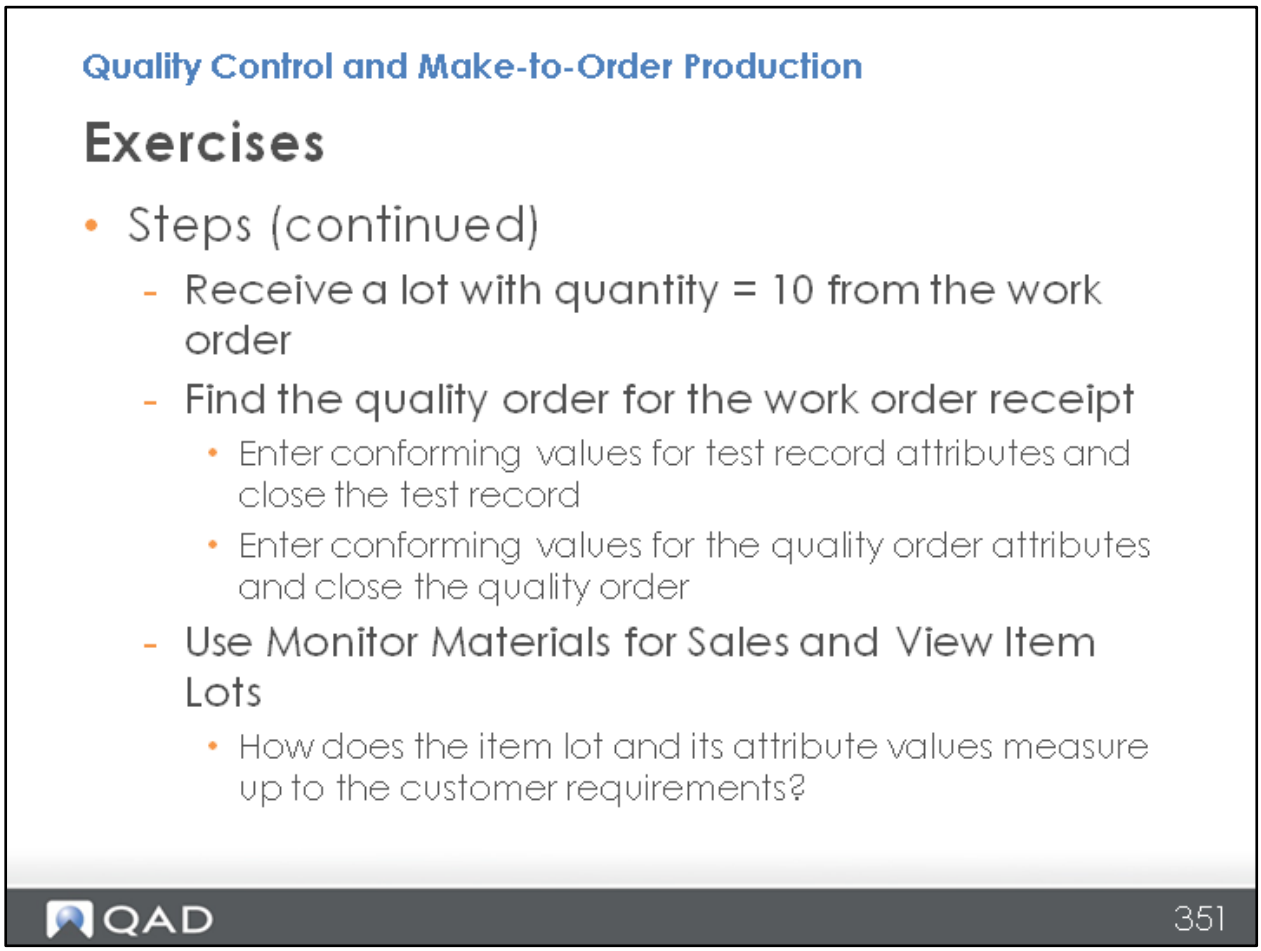
Exercises

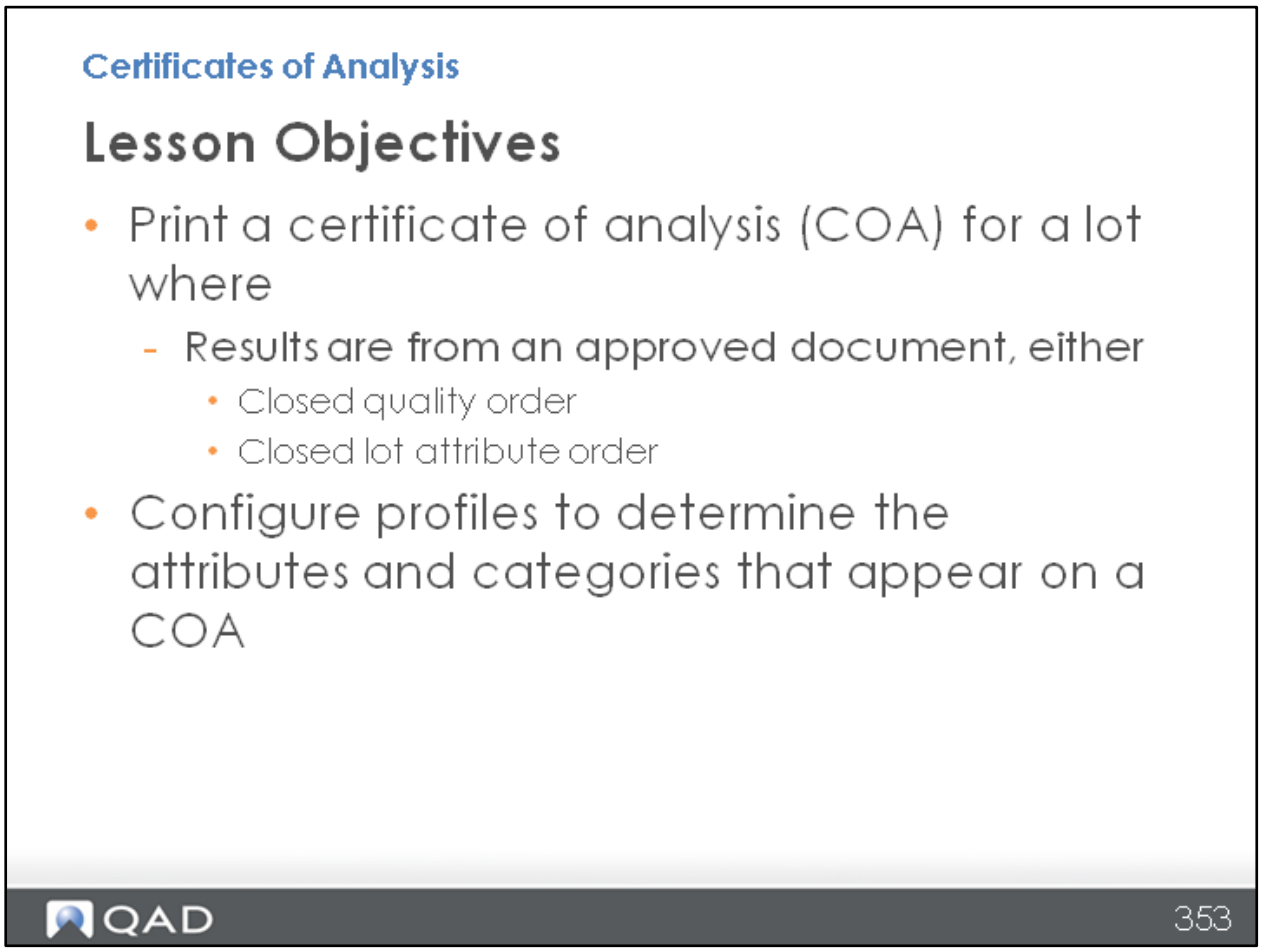

Quality Control and Make-to-Order Production
Exercises
• Steps (continued)
- Receive a lot with quantity = 10 from the work order
- Find the quality order for the work order receipt
• Enter conforming values for test record attributes and close the test record
• Enter conforming values for the quality order attributes and close the quality order
- Use Monitor Materials for Sales and View Item Lots
• How does the item lot and its attribute values measure up to the customer requirements?
QAD
351

CHAPTER 12

Certificate of Analysis

Certificates of Analysis

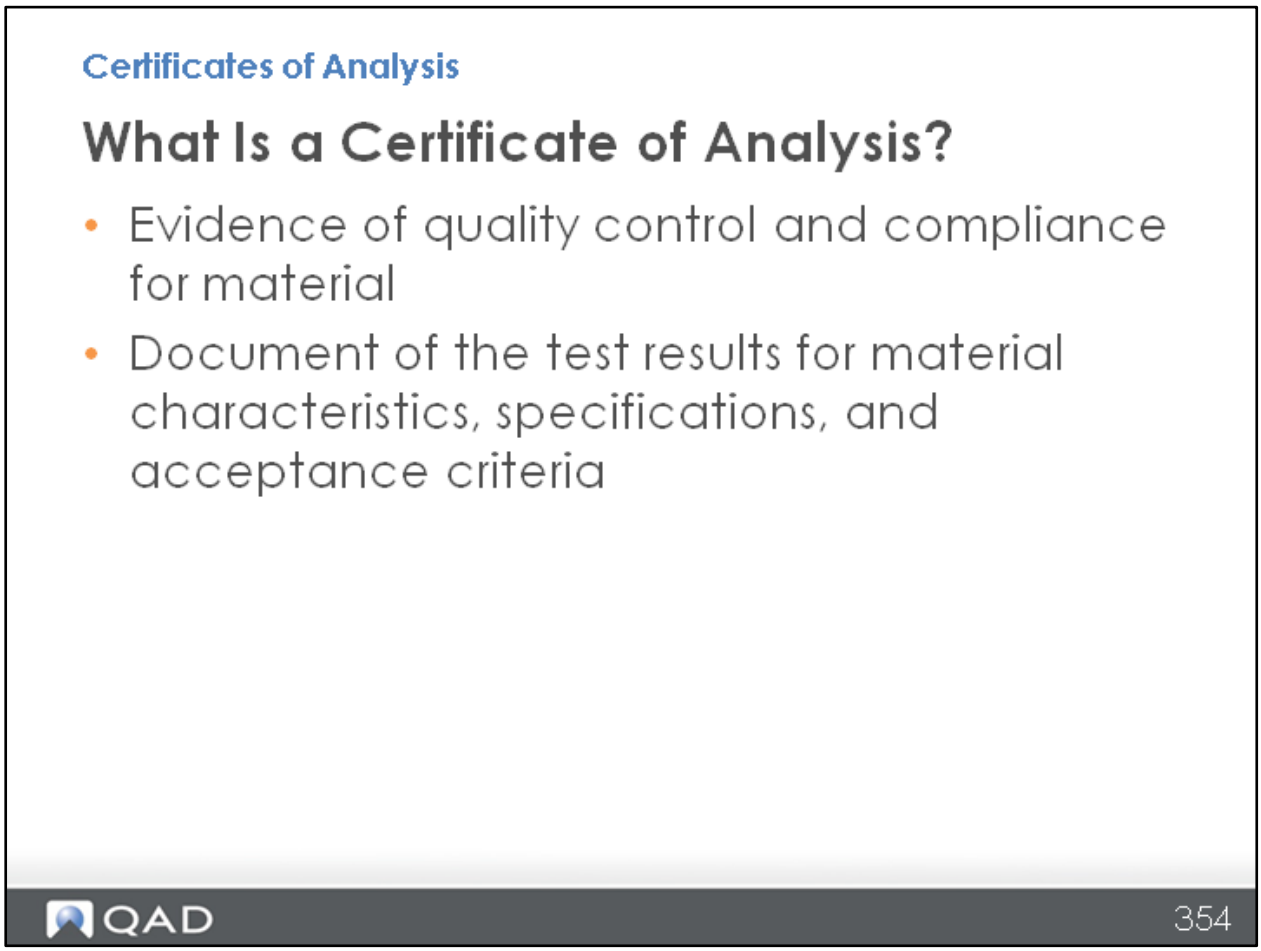
Lesson Objectives



When you finish this section, you will be able to build certificates of analysis. You will know how to mark attributes for inclusion in certificates. You can then print certificates including those attributes.

This provides control over your reporting process. When complete, you can create comprehensive reports on your quality control process from within QAD EE.

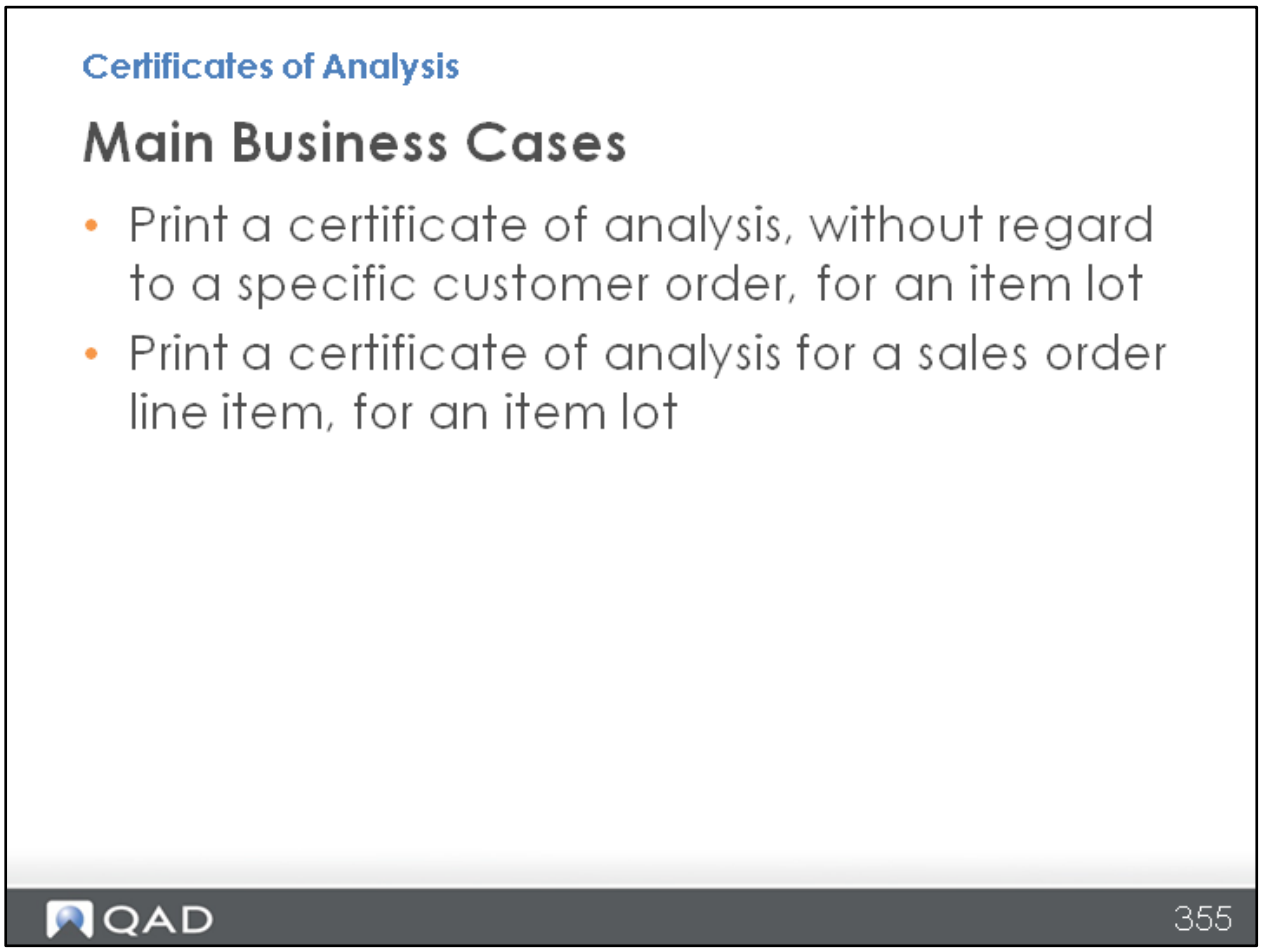
What Is a Certificate of Analysis?



This section of training covers certificates of analysis. These printed reports provide documentation for a lot's attributes and information on how they were obtained. These are the published product of the quality control process.

Completing certificates of analysis combines the data types that you have used so far. A certificate provides a full view of the quality control process. You can see each subject that you have covered present in the final product.

Main Business Cases

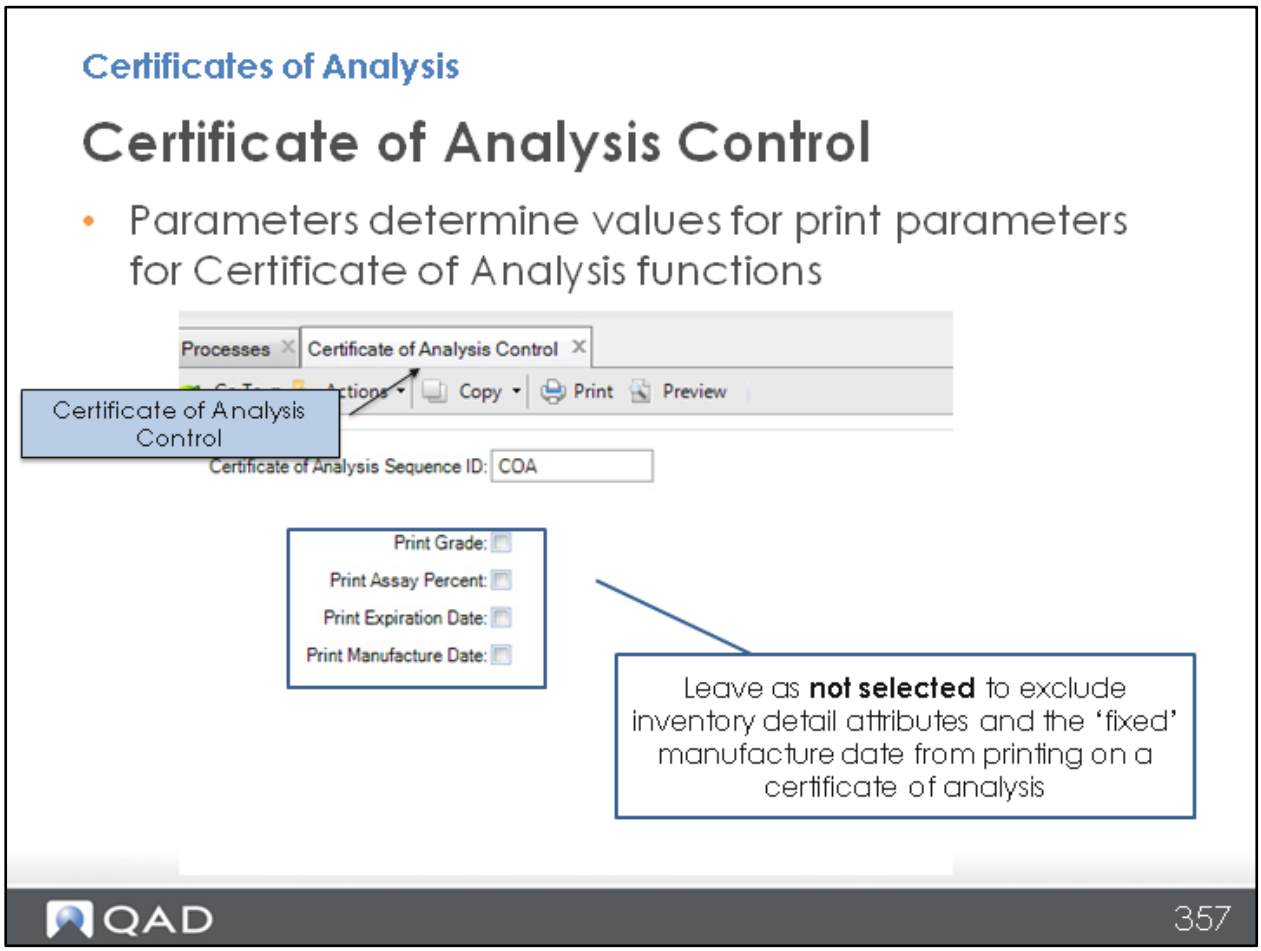


There are two common circumstances for a certificate analysis that this training focuses on. The first involves printing common certificates for a lot, not specific to a certain order. The second involves a certificate made for a specific sales order.

Both print based off of closed quality orders.

Setup Requirements to Print Certificates

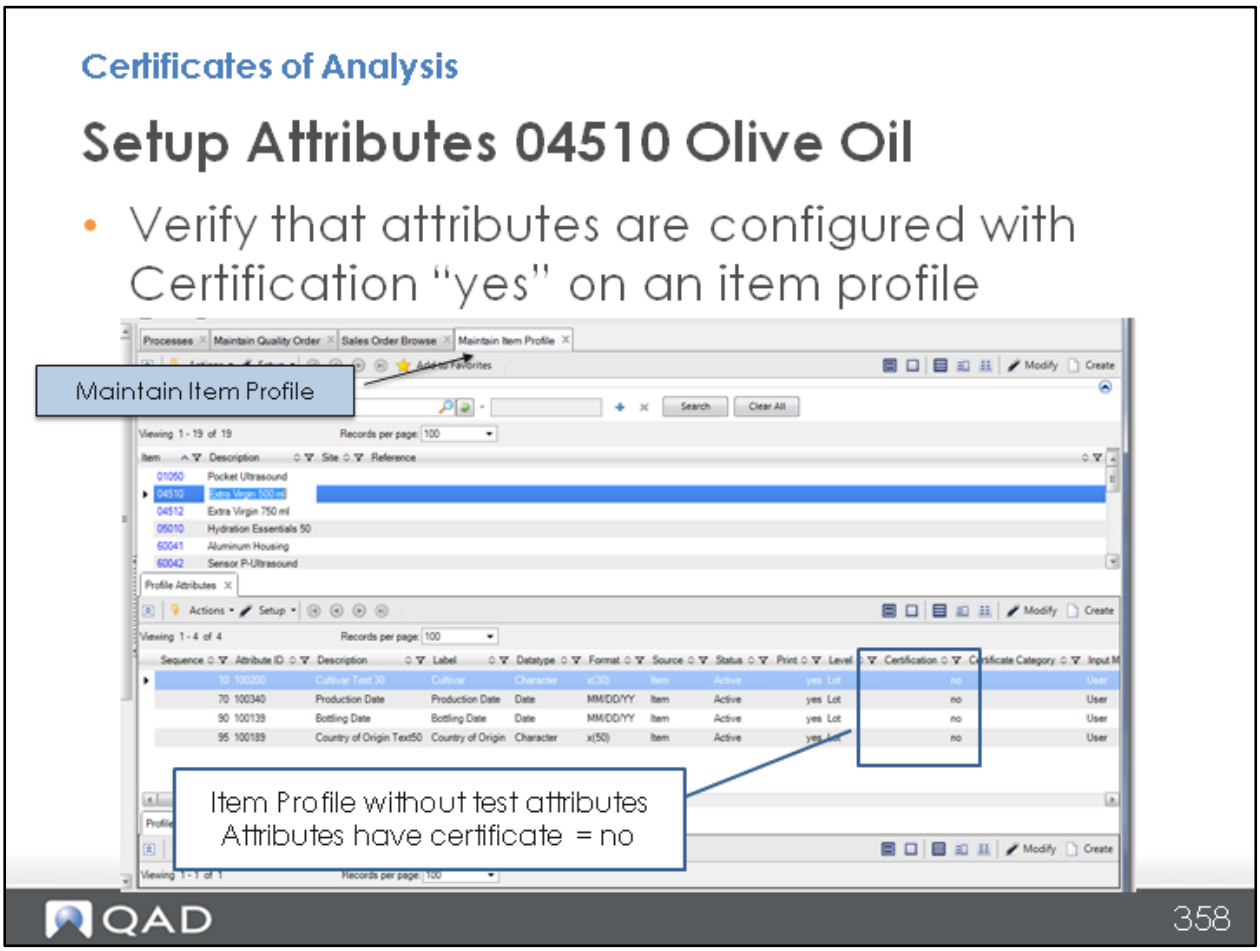
Certificate of Analysis Control



The Certificate of Analysis Control browse offers general options for the printing of Certificates of Analysis.

These deal with the printing of certain regulatory attributes as well as a fixed manufacture date. For the moment, leave these unchecked.

Setup Attributes 04510 Olive Oil

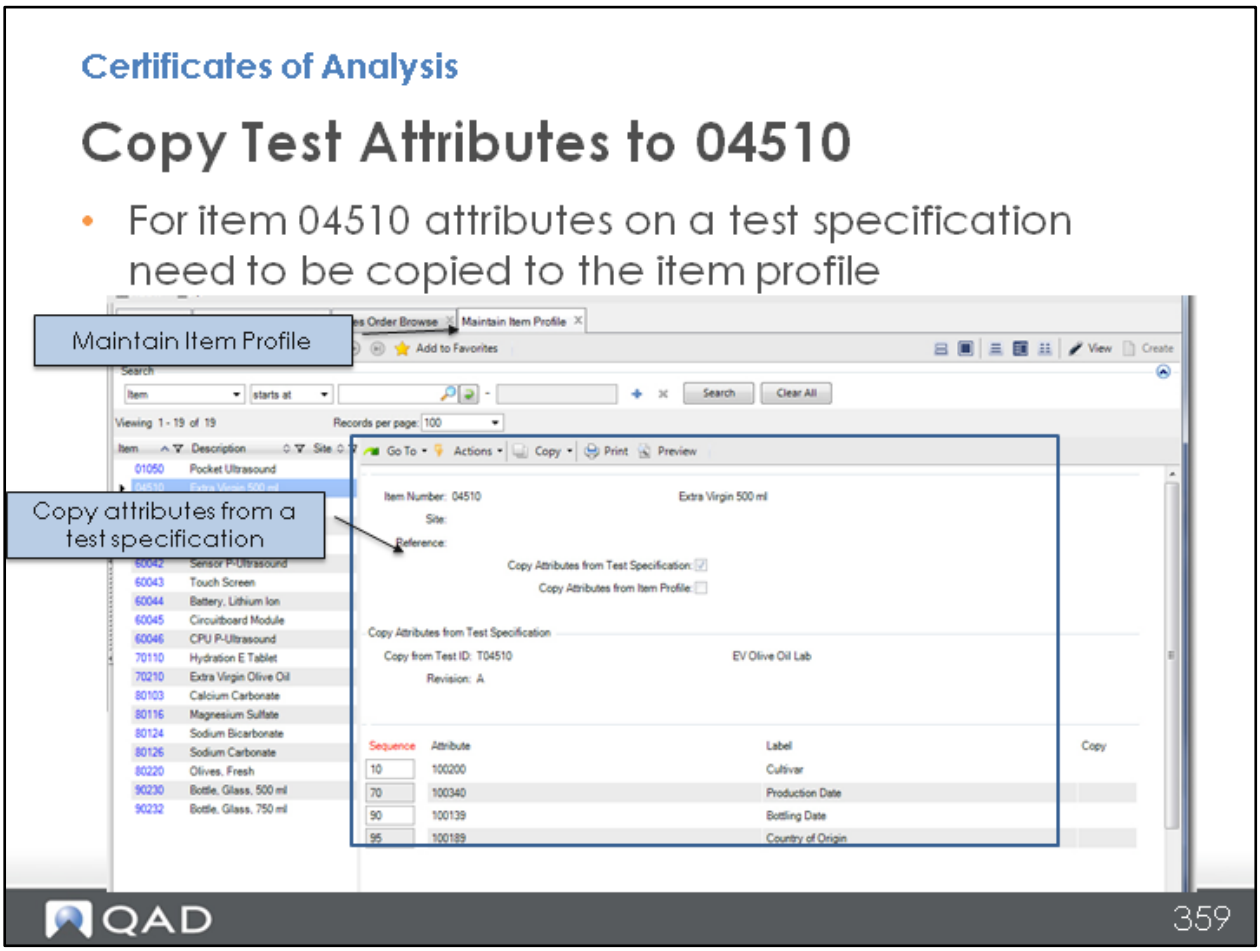


In order to print on certificates of analysis, attributes must be on the item's profile and have a Certification value of Yes.

This often requires you to copy attributes from a test specification to an item profile.

Also specify a Certification Category to organize attribute specifications and results by category.

Copy Test Attributes to 04510

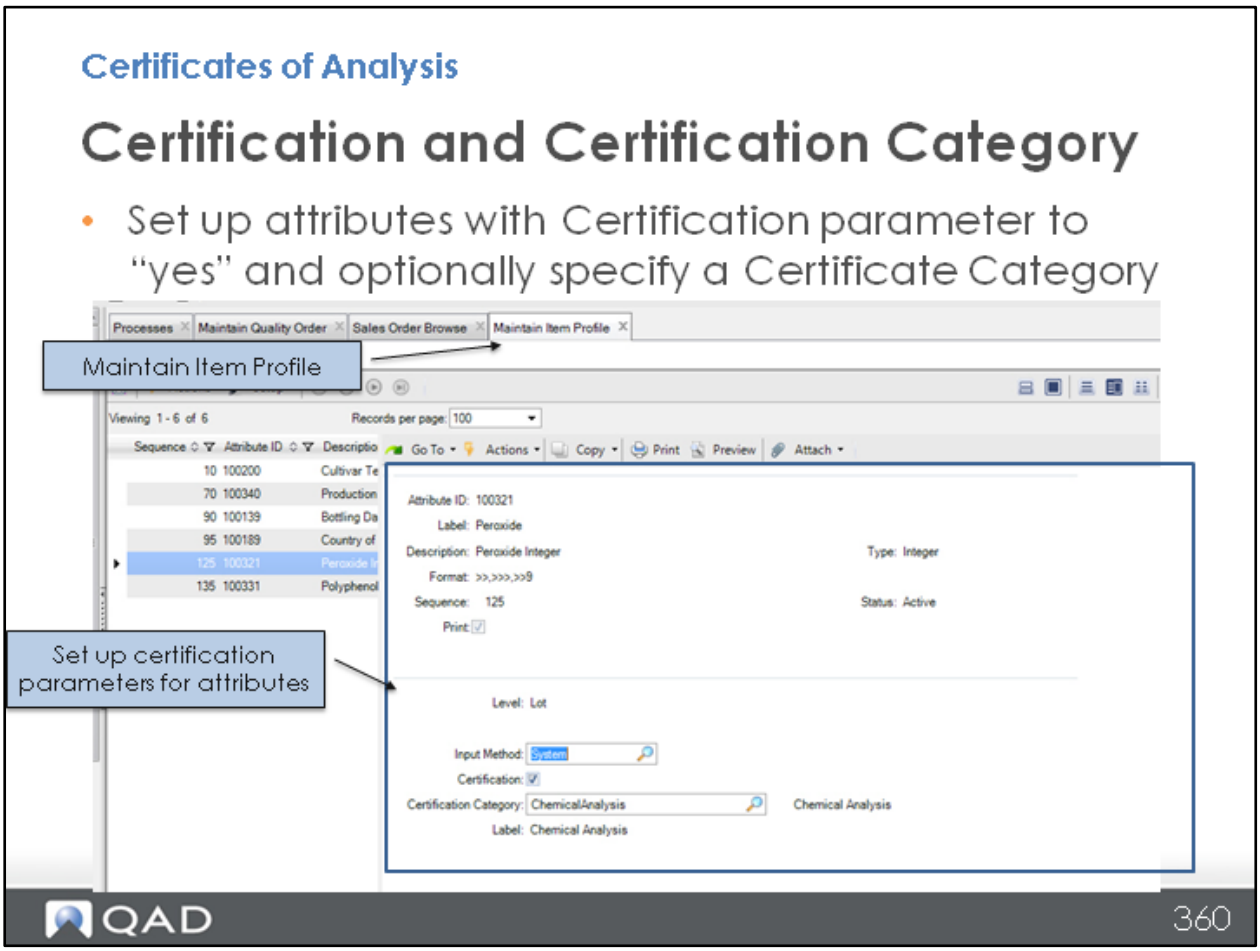


To copy attributes to an item profile, first enter the Maintain Item Profile browse. Select and Modify the attribute. Check the Copy Attributes from Test Specification option and click Next.

Select the correct Test ID and Revision, and click Next.

Verify that the attributes are correct and confirm the copy.

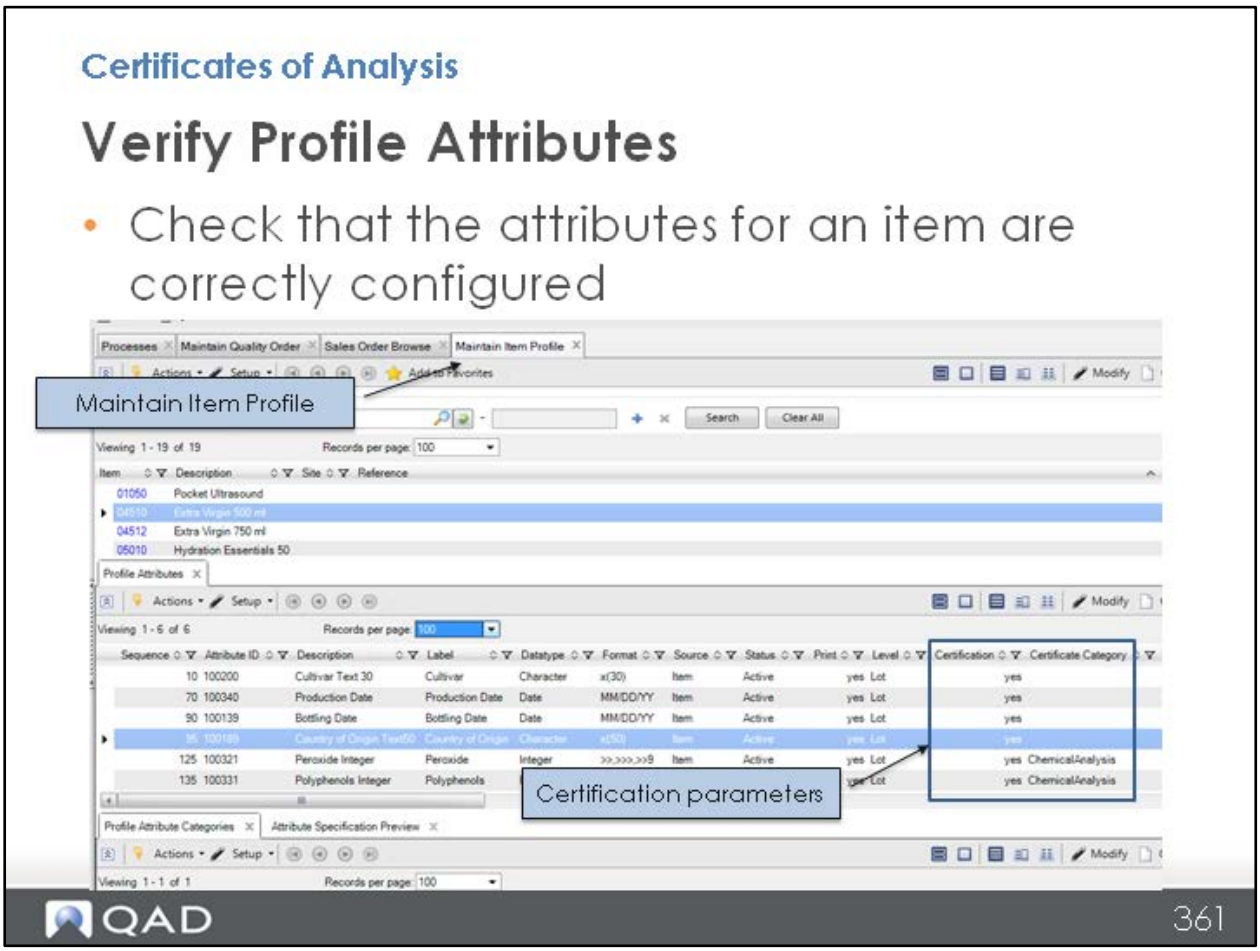
Certification and Certification Category



Each attribute can have a Certification Category. These determine how the attributes are sorted on a certificate of analysis.

Certification attributes without a Certification Category will not be placed under a specific category on a certificate of analysis.

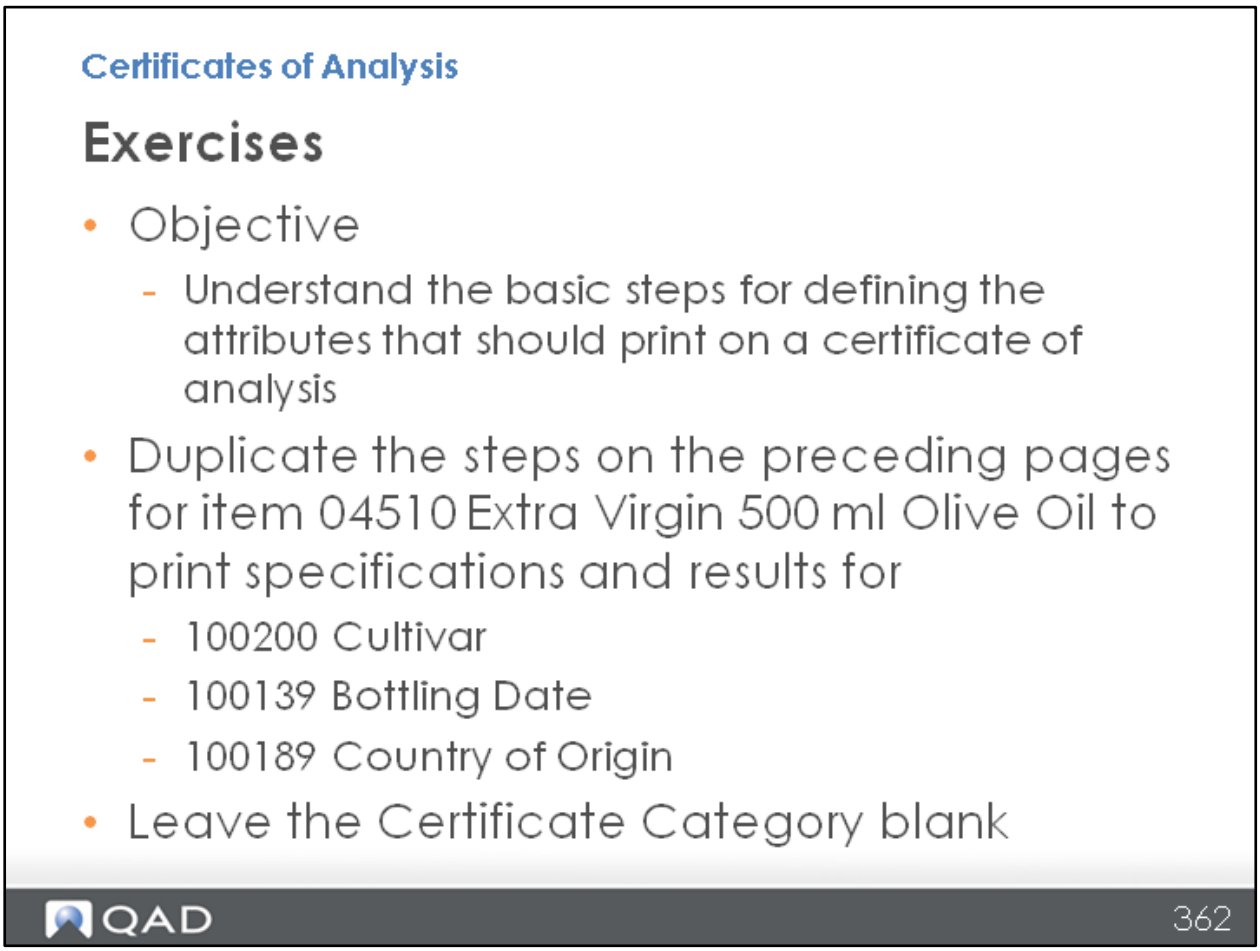
Verify Profile Attributes



The above graphic now shows that the item profile contains a number of certification attributes. They have a Certification value of Yes, and several have a Certificate Category value.

These attributes will print on certificates of analysis for lots matching this item.

Exercises


Certificates of Analysis
Exercises
Objective
Understand the basic steps for defining the attributes that should print on a certificate of analysis
Duplicate the steps on the preceding pages for item 04510 Extra Virgin 500 ml Olive Oil to print specifications and results for
100200 Cultivar
100139 Bottling Date
100189 Country of Origin
Leave the Certificate Category blank
QAD
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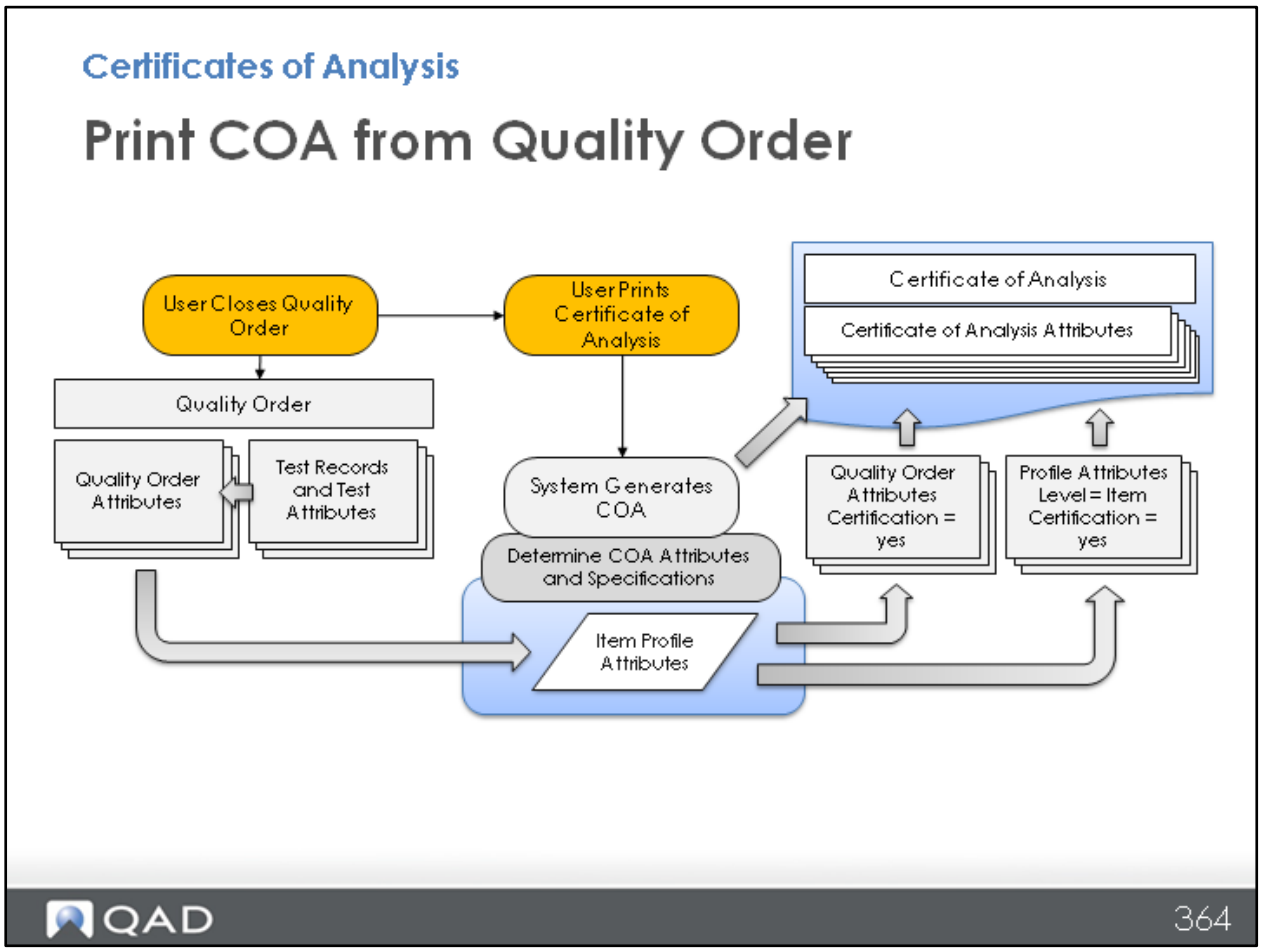
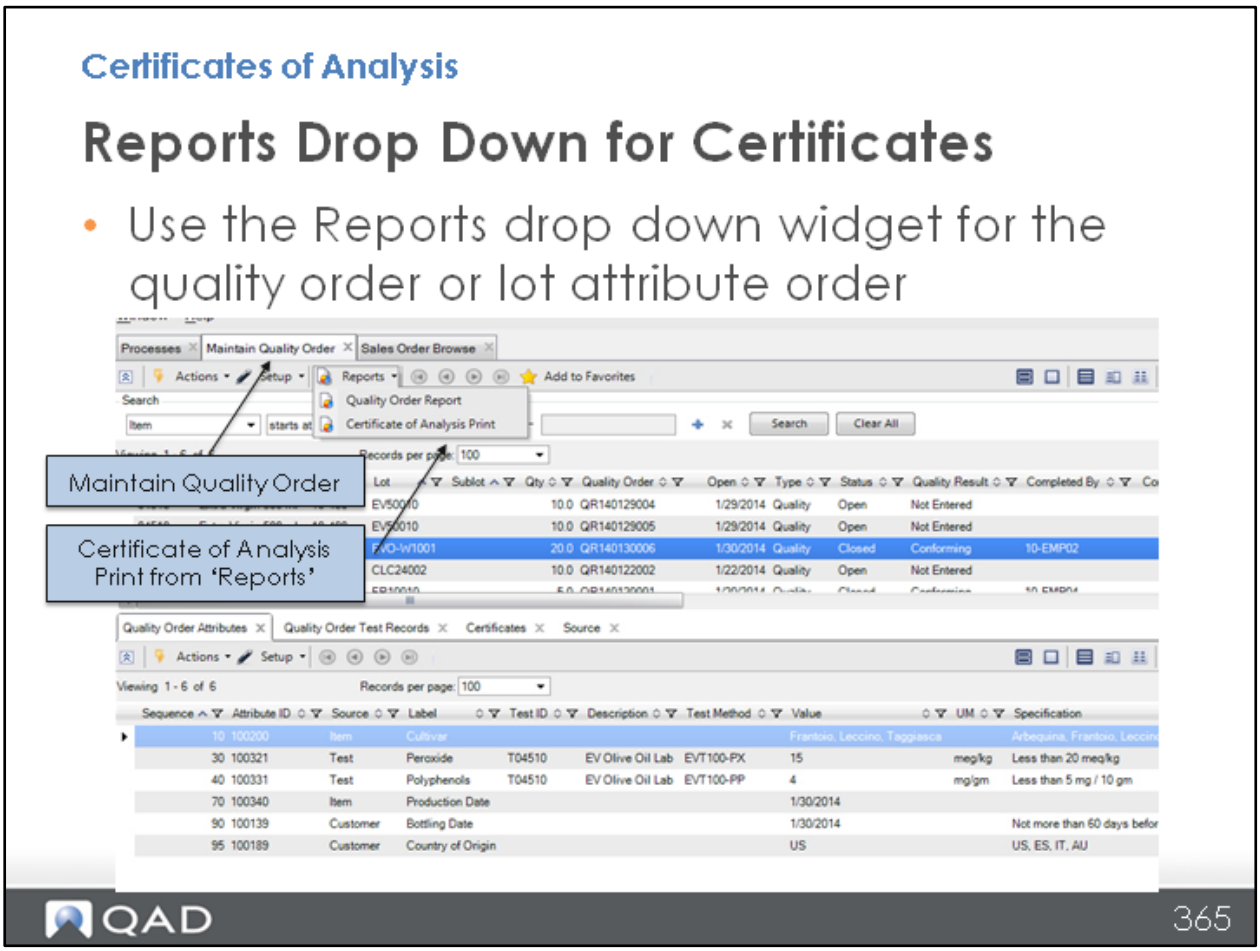
Printing and Reprinting Certificates

Print COA from Quality Order



Users can print certificates of analysis off of closed quality orders. These contain item level attributes from the item profile and lot level attributes from the quality order. In each case, the attributes must have a Certification Value of Yes.

Reports Drop Down for Certificates



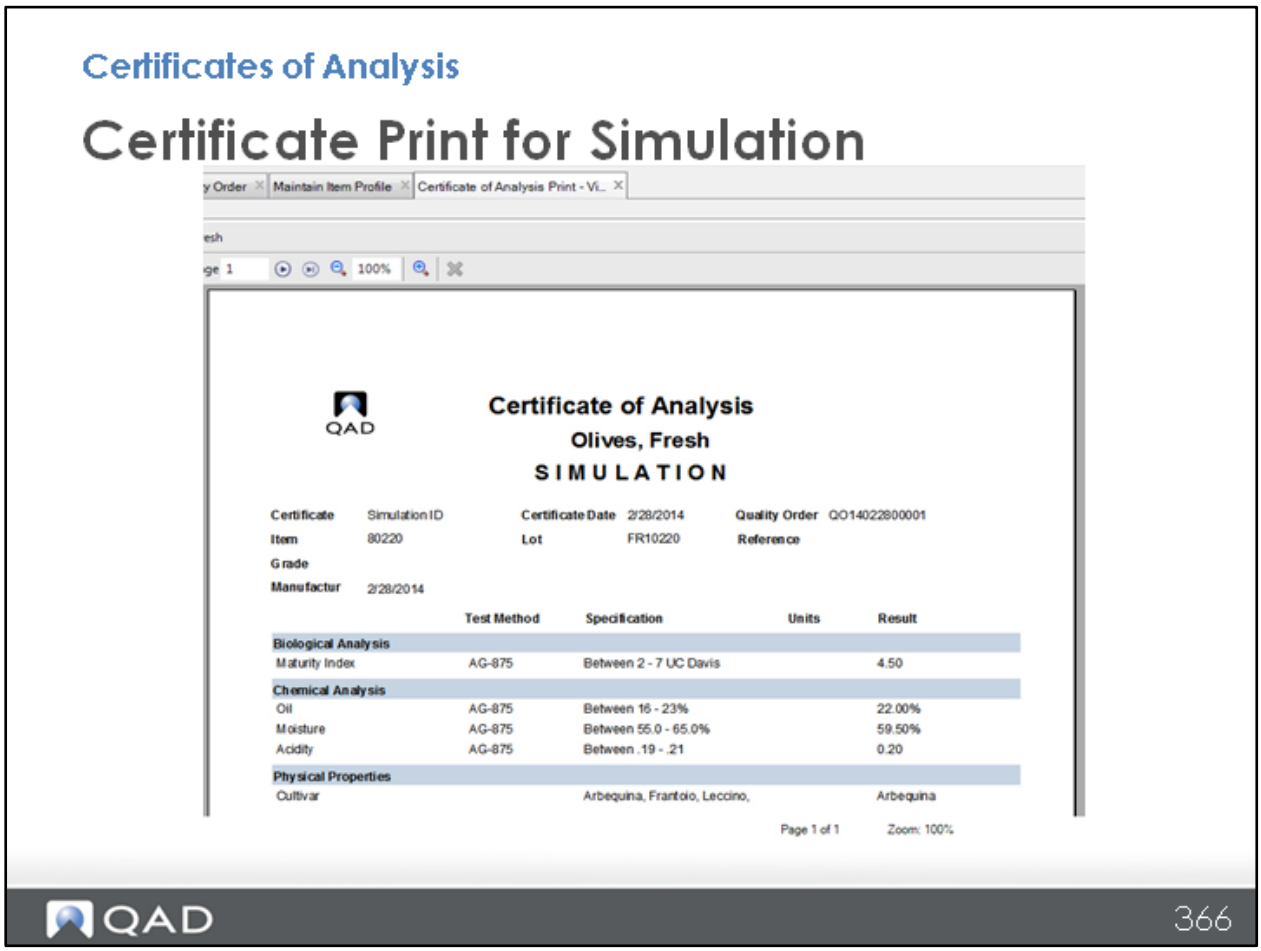
You can print certificates of analysis for quality orders through the Maintain Quality Order browse collection. Open the Reports drop down menu and select the Certificate of Analysis Print option.

Note:

The Reports option is available only on the Maintain Quality Order and Maintain Quality Order for SO Line

It is not available on the Maintain Quality Order for Production and Maintain Quality Order for Purchasing

Certificate Print for Simulation

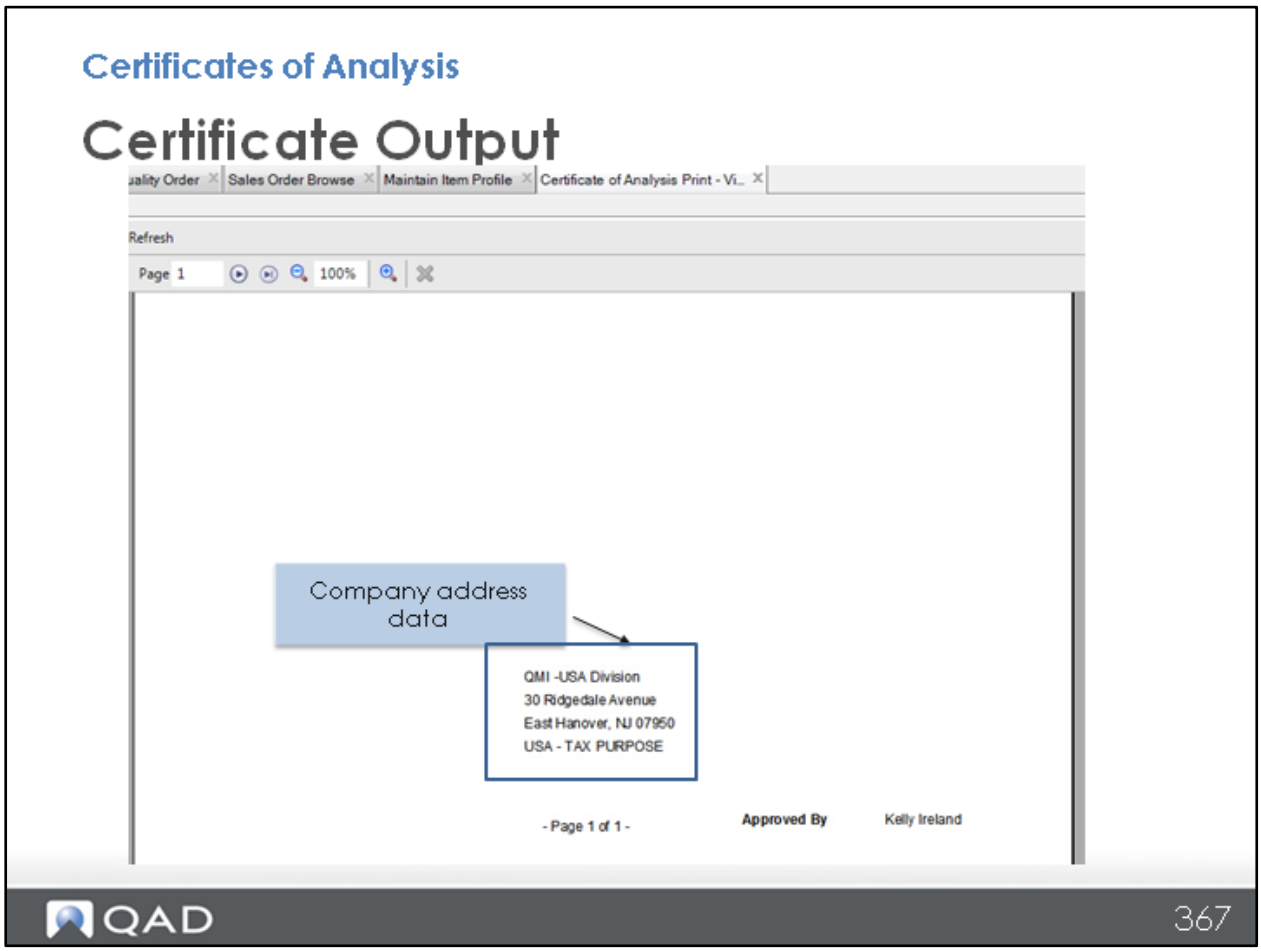


After running a certificate of analysis, the system then generates a simulation of the complete certificate. Use this simulation to verify that the certificate runs with the correct attributes.

Attribute measurement appears in the Units column.

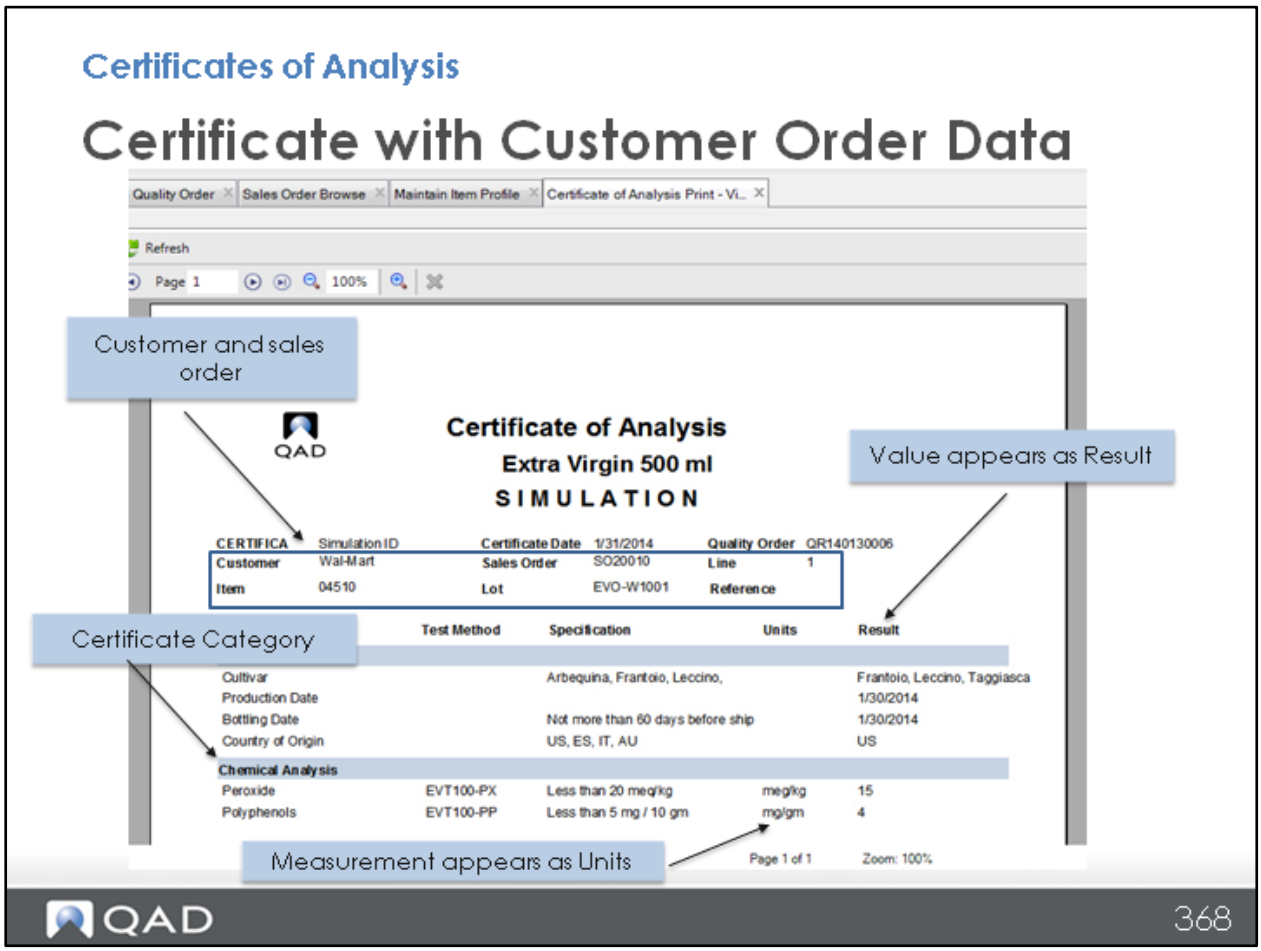
Attribute value appears in the Result column.

Certificate Output



The footer for each Certificate of Analysis contains identifying information for the printing company and identifies the employee who signed off on the quality order.

Certificate with Customer Order Data

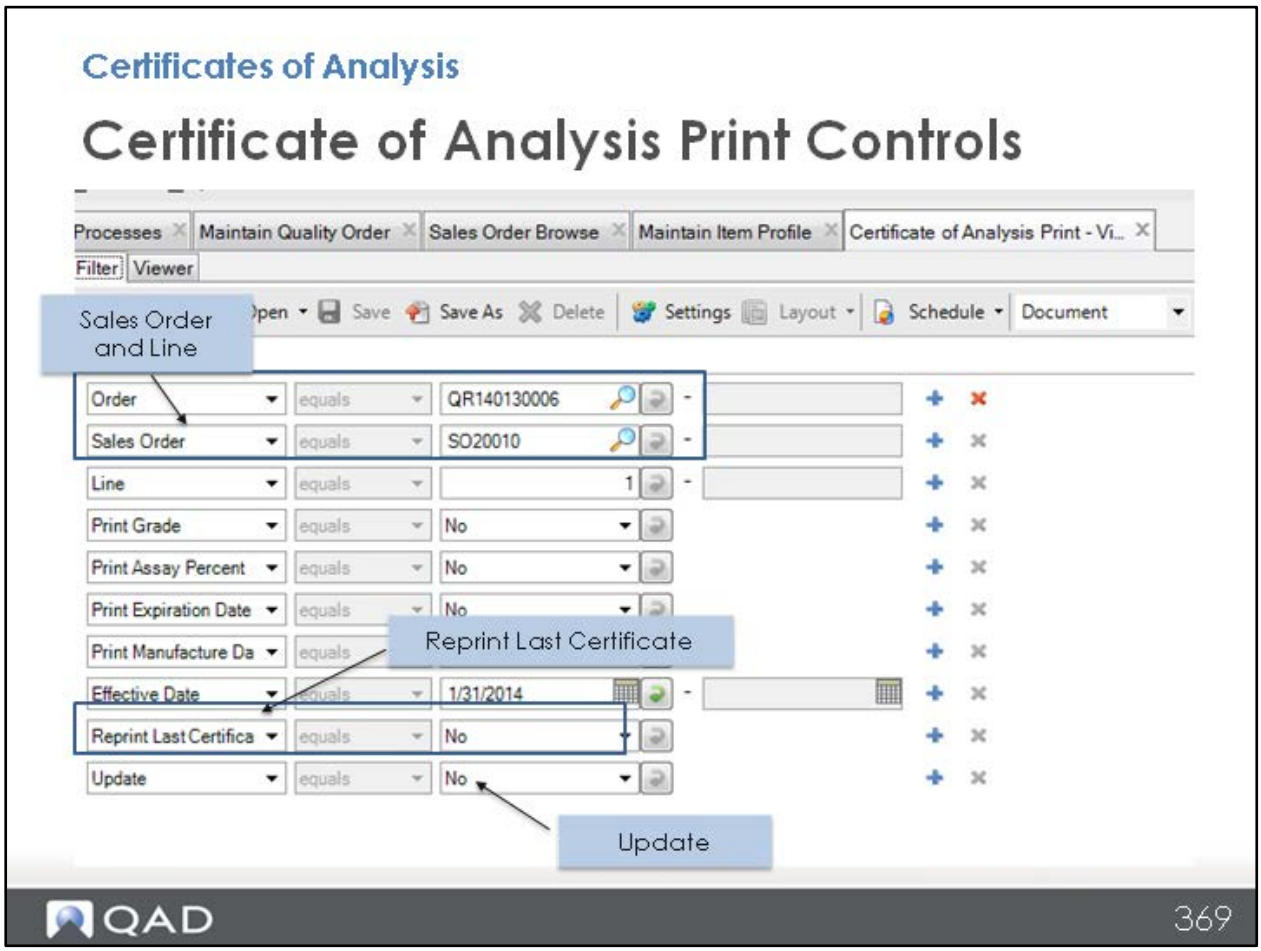


Certificates of analysis can print for quality orders which are linked to a certain sales order. In this case, they also print data on the associated customer and sales order line.

Attribute measurement appears in the Units column.

Attribute value appears in the Result column.

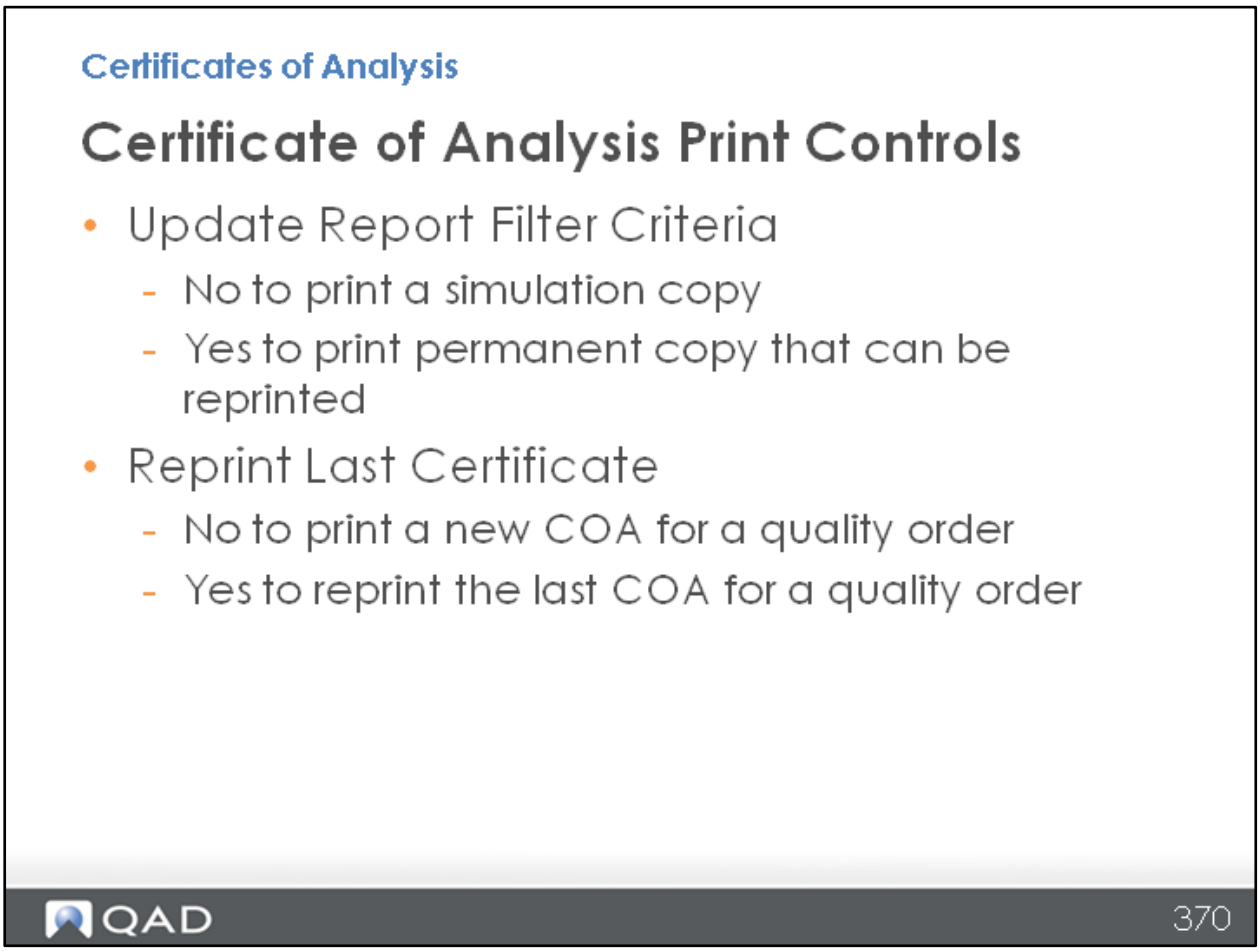
Certificate of Analysis Print Controls



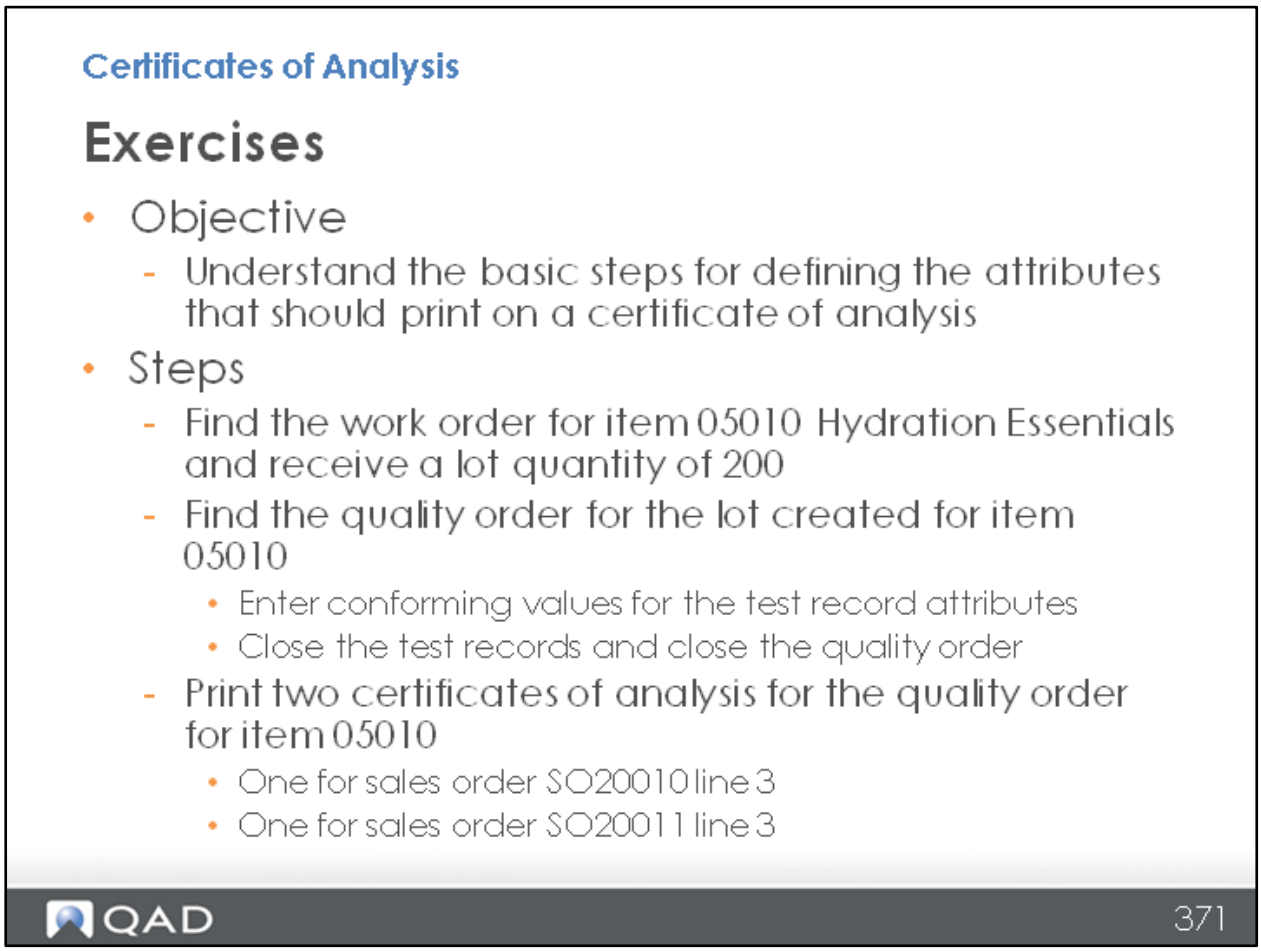
To print a permanent, non-simulation copy of a certificate of analysis, set Update to Yes in the filter controls.

To reprint the previous copy of the certificate of analysis, set Reprint Last Certificate to Yes in the filter controls.

Certificate of Analysis Print Controls



Exercises


Certificates of Analysis
Exercises
Objective
Understand the basic steps for defining the attributes that should print on a certificate of analysis
Steps
Find the work order for item 05010 Hydration Essentials and receive a lot quantity of 200
Find the quality order for the lot created for item 05010
Enter conforming values for the test record attributes
Close the test records and close the quality order
Print two certificates of analysis for the quality order for item 05010
One for sales order SO20010 line 3
One for sales order SO20011 line 3
QAD
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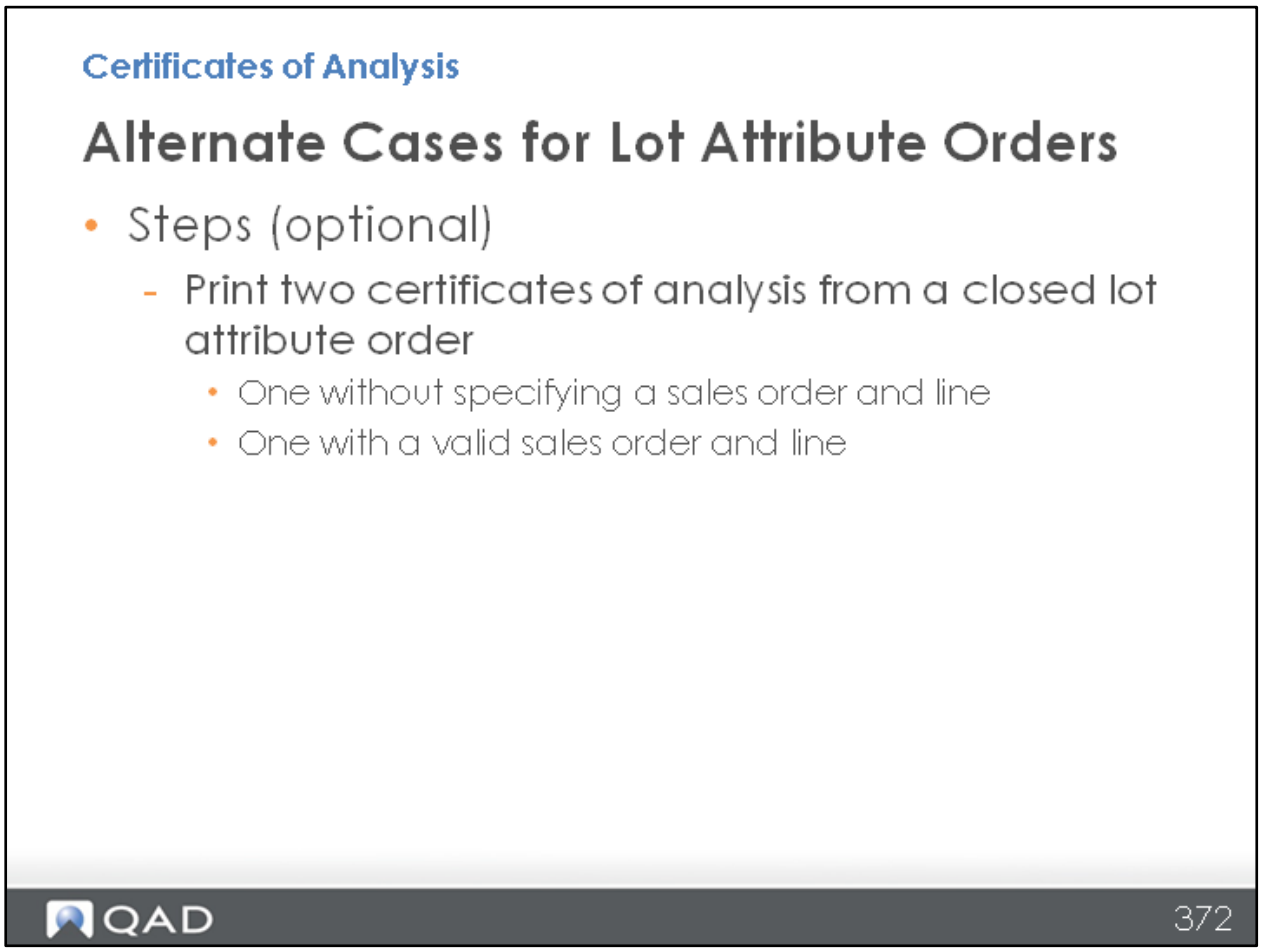
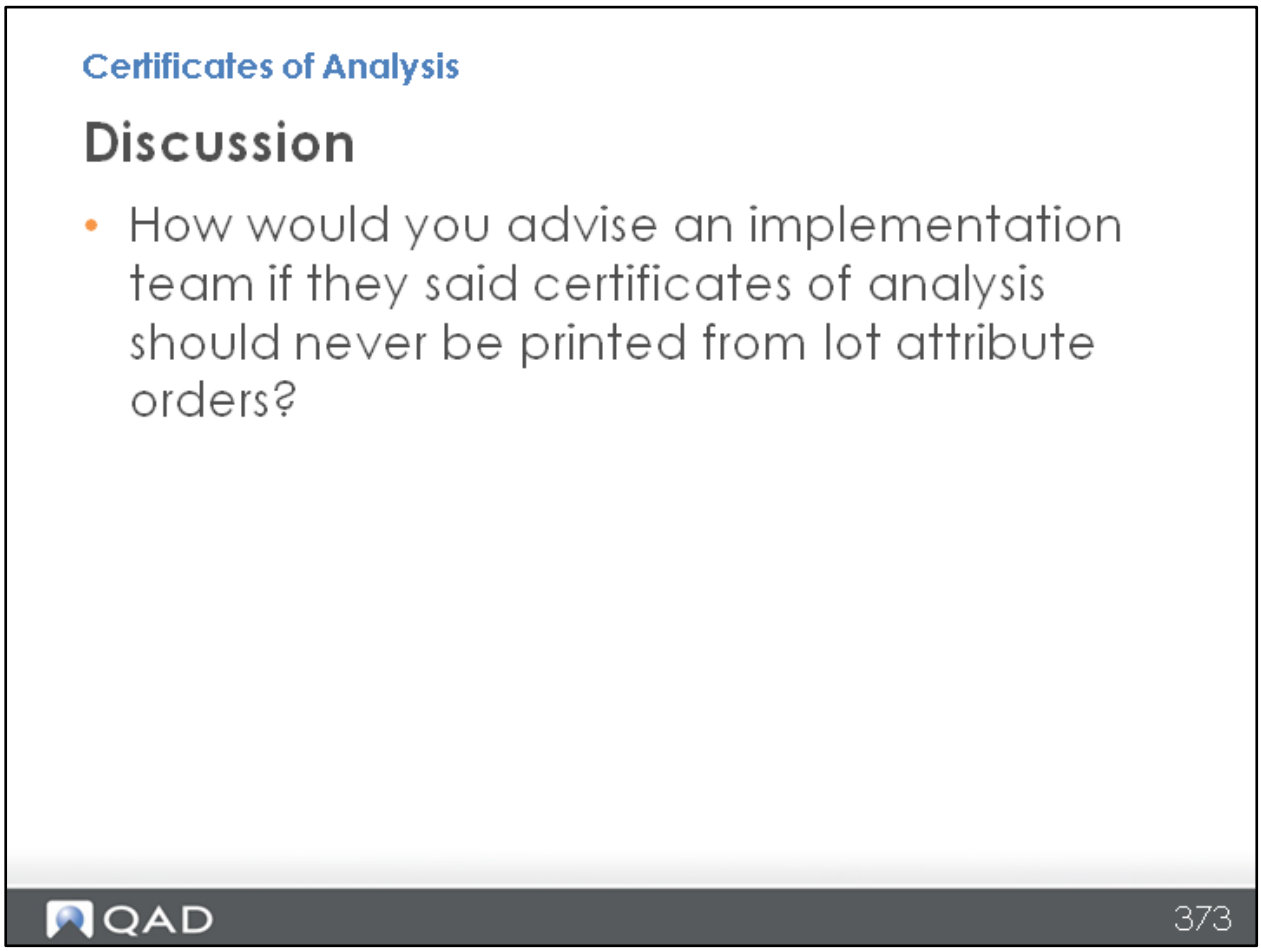
Alternate Cases for Lot Attribute Orders



In addition to quality orders, you can also print certificates of analysis for lot attribute orders. Consider how the common use cases which you have covered for quality orders could also apply to quality orders.

Discussion


Certificates of Analysis
Discussion
How would you advise an implementation team if they said certificates of analysis should never be printed from lot attribute orders?
QAD
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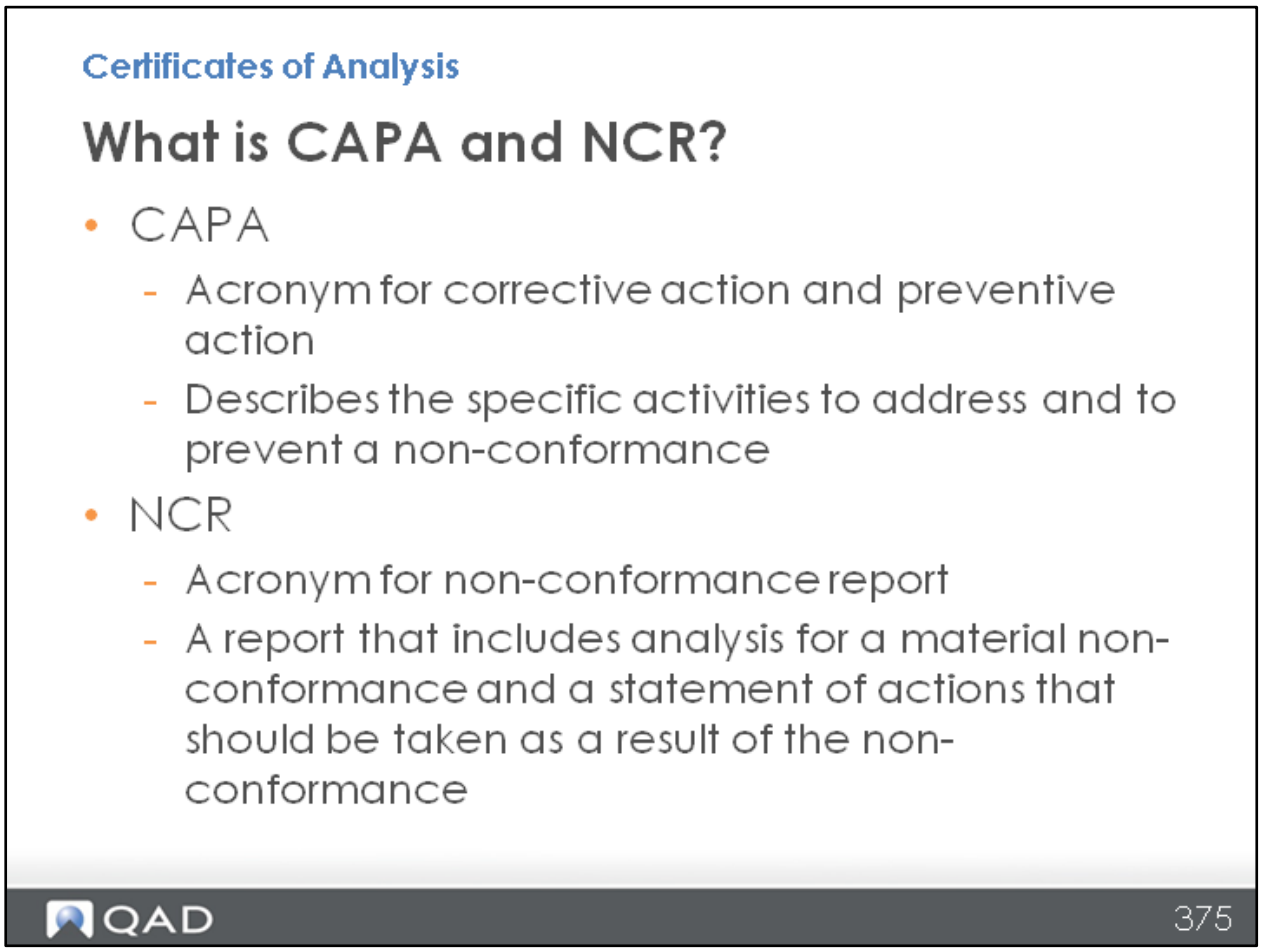
CHAPTER 13

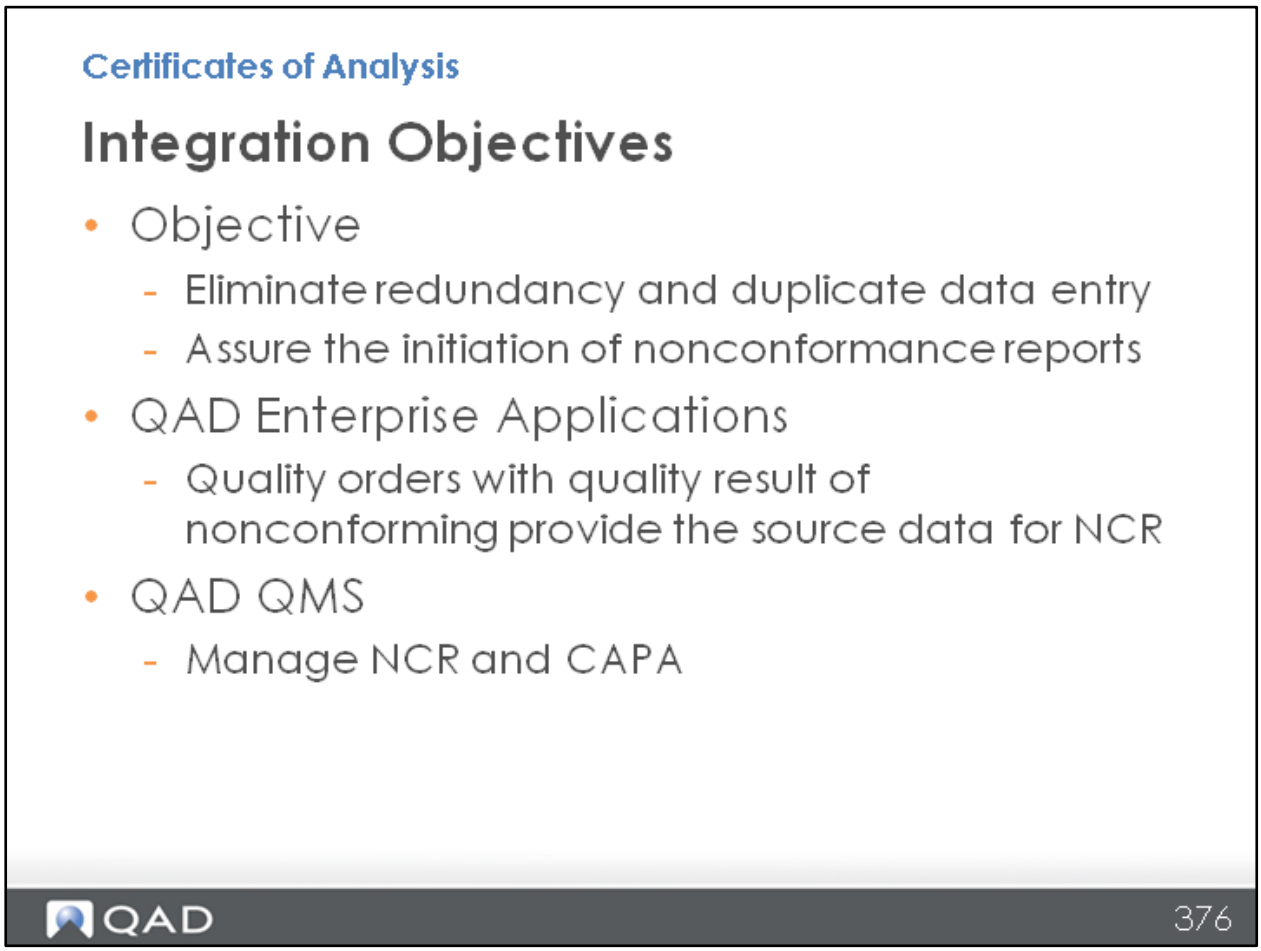
Integration with QAD QMS for CAPA/NCR

Integration with QAD QMS for CAPA/NCR

What is CAPA and NCR?



Integration Objectives



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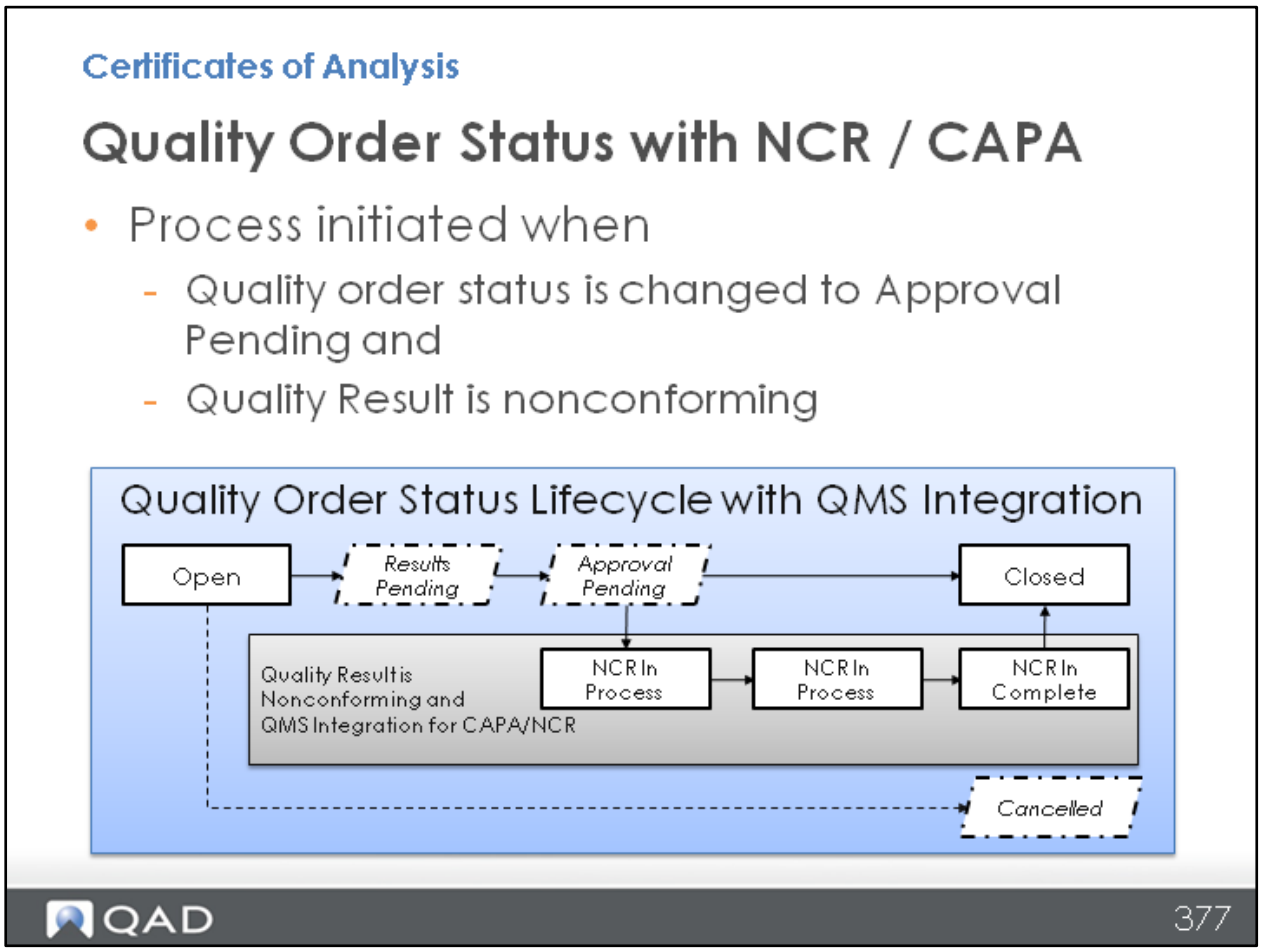
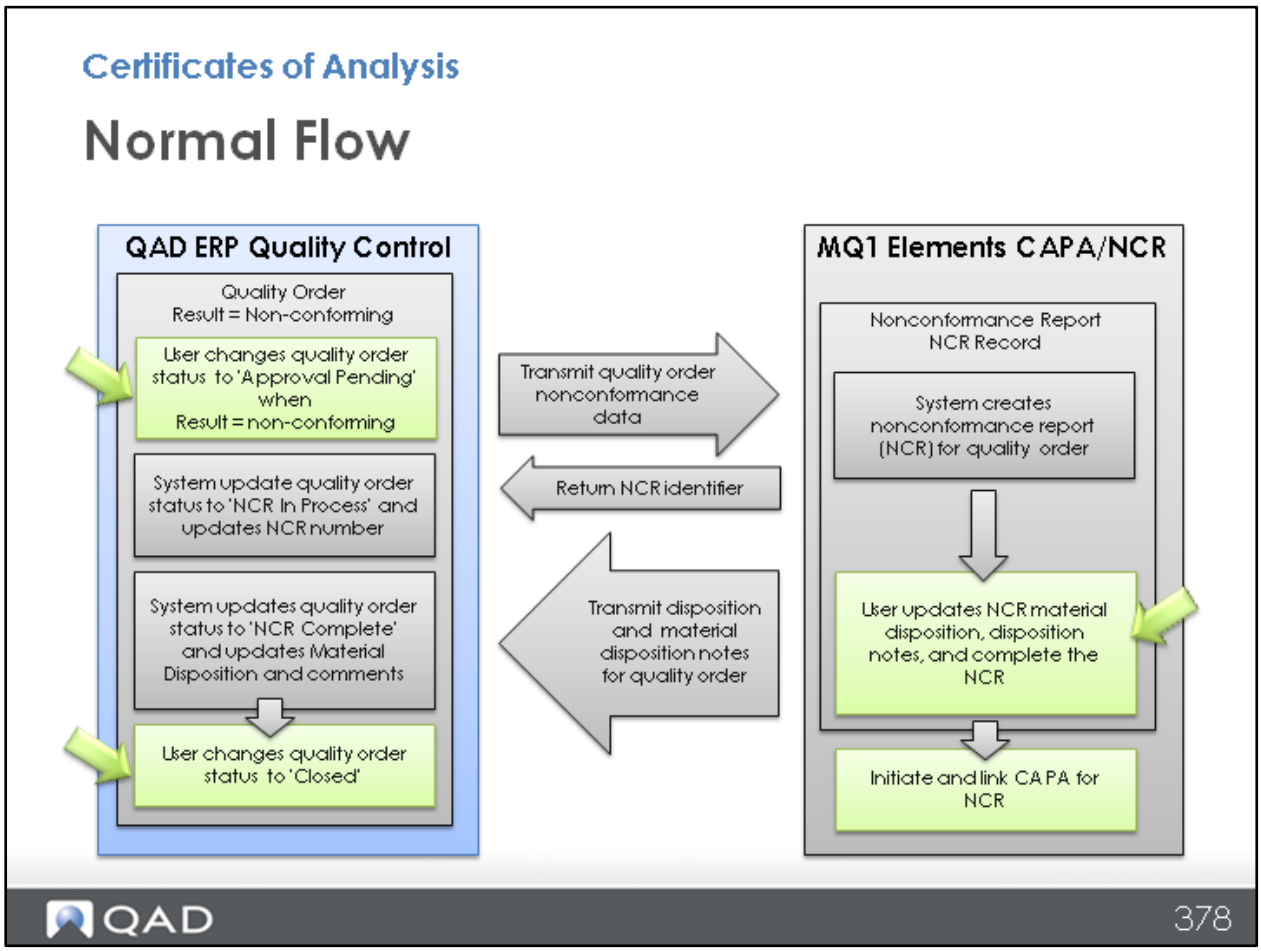
Quality Order Status with NCR / CAPA



QAD transmits information for the quality order and nonconforming attributes to QAD QMS

Normal Flow



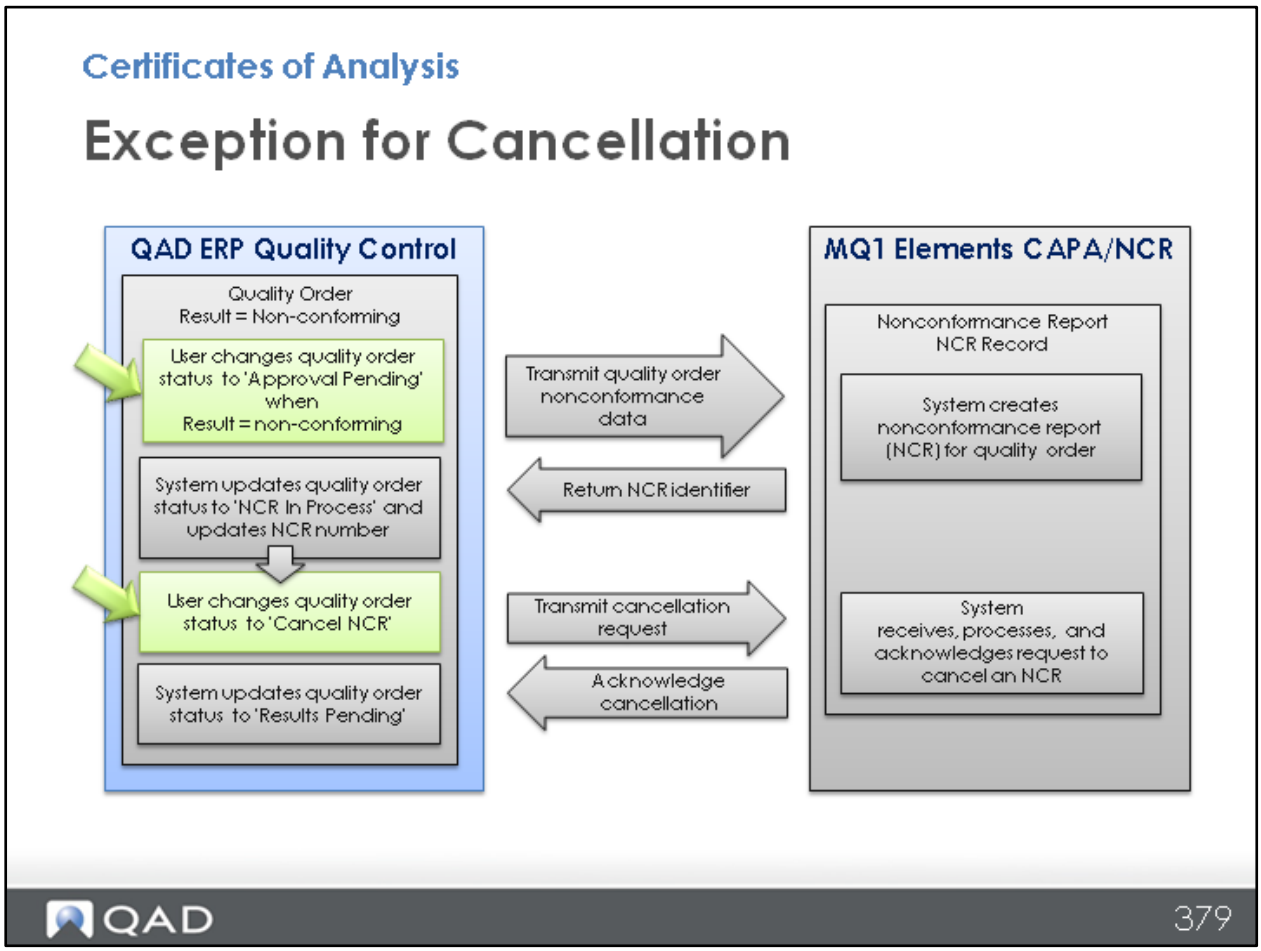
Quality Control provides

Non-conformance data for item and attribute(s)

QAD QMS provides

NCR number and material disposition

Exception for Cancellation



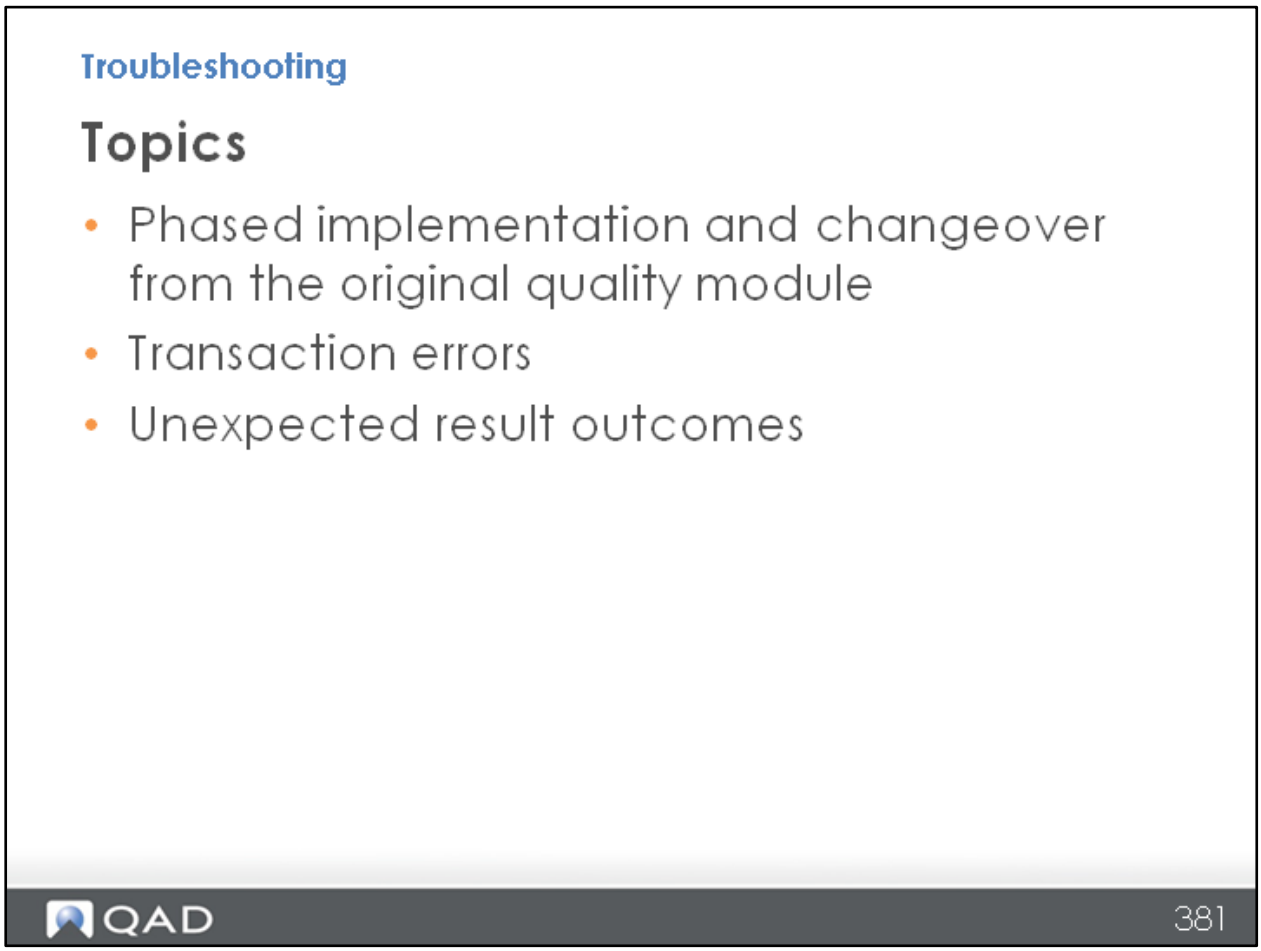
The ability to cancel an NCR is provided in the event that a quality order status was accidently changed to Approval Pending and its result was non-conforming

CHAPTER 14

Troubleshooting

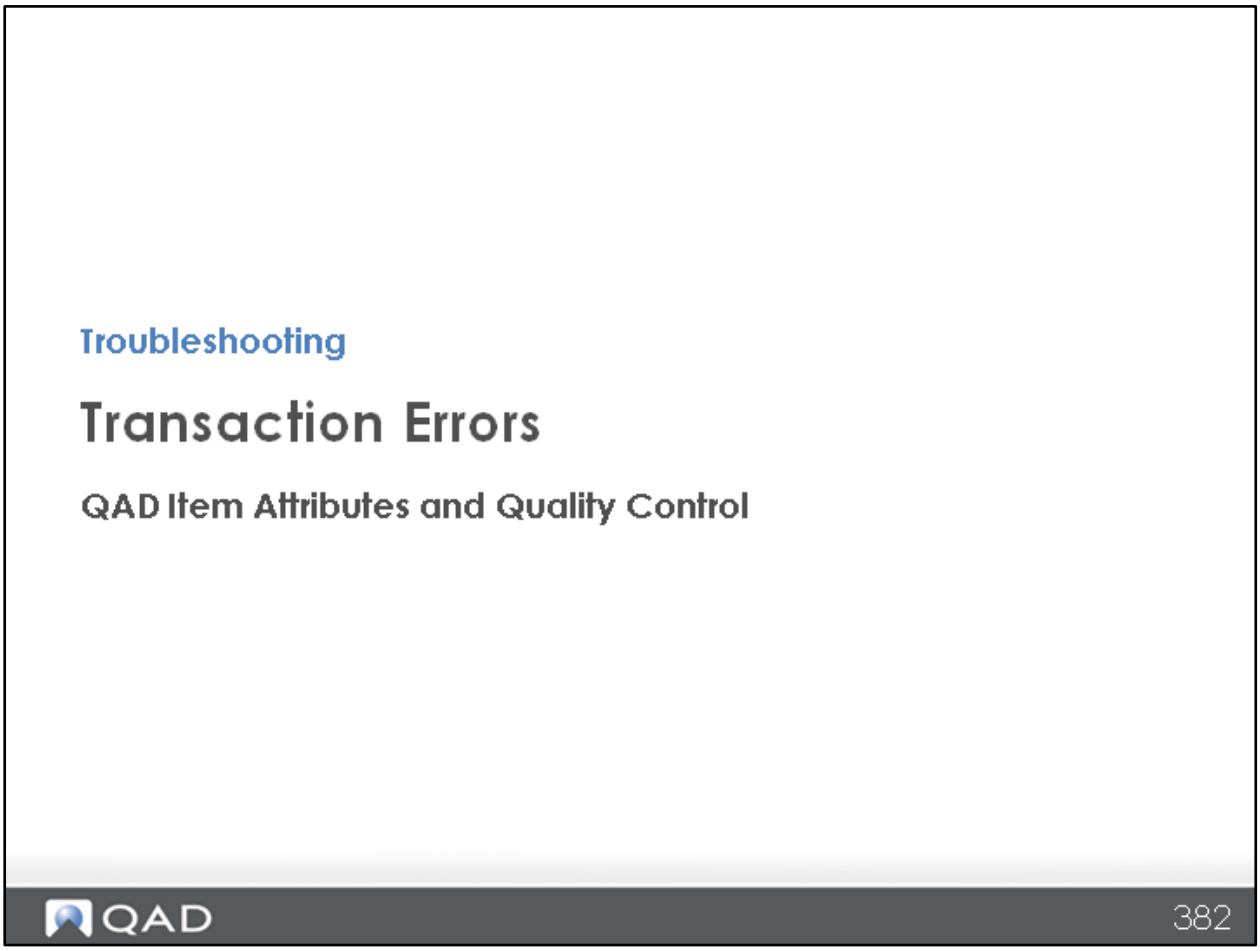
Troubleshooting

Topics

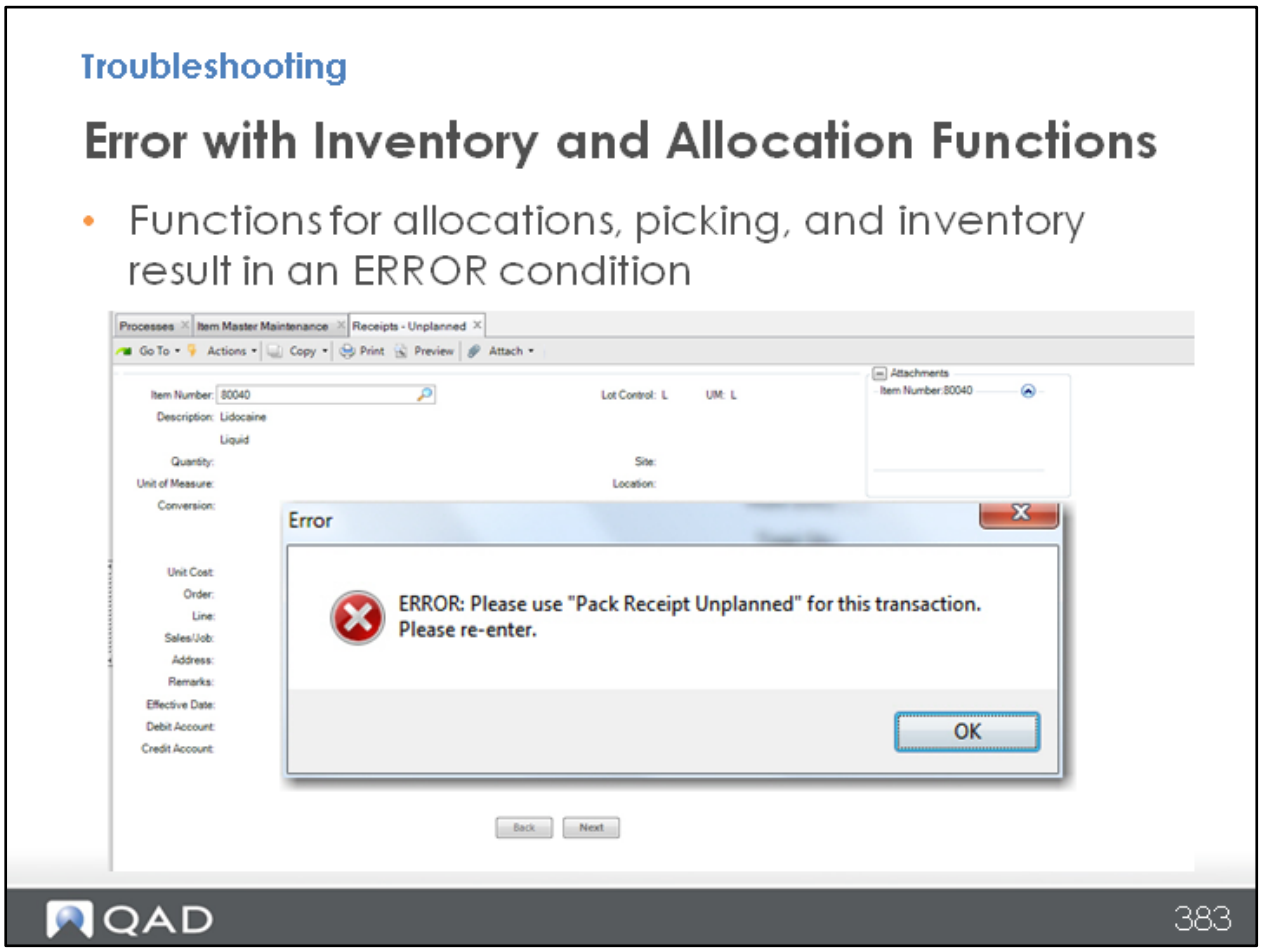


Maintenance and transactions functions are included in the release but must be added to the menu manually

Transaction Errors

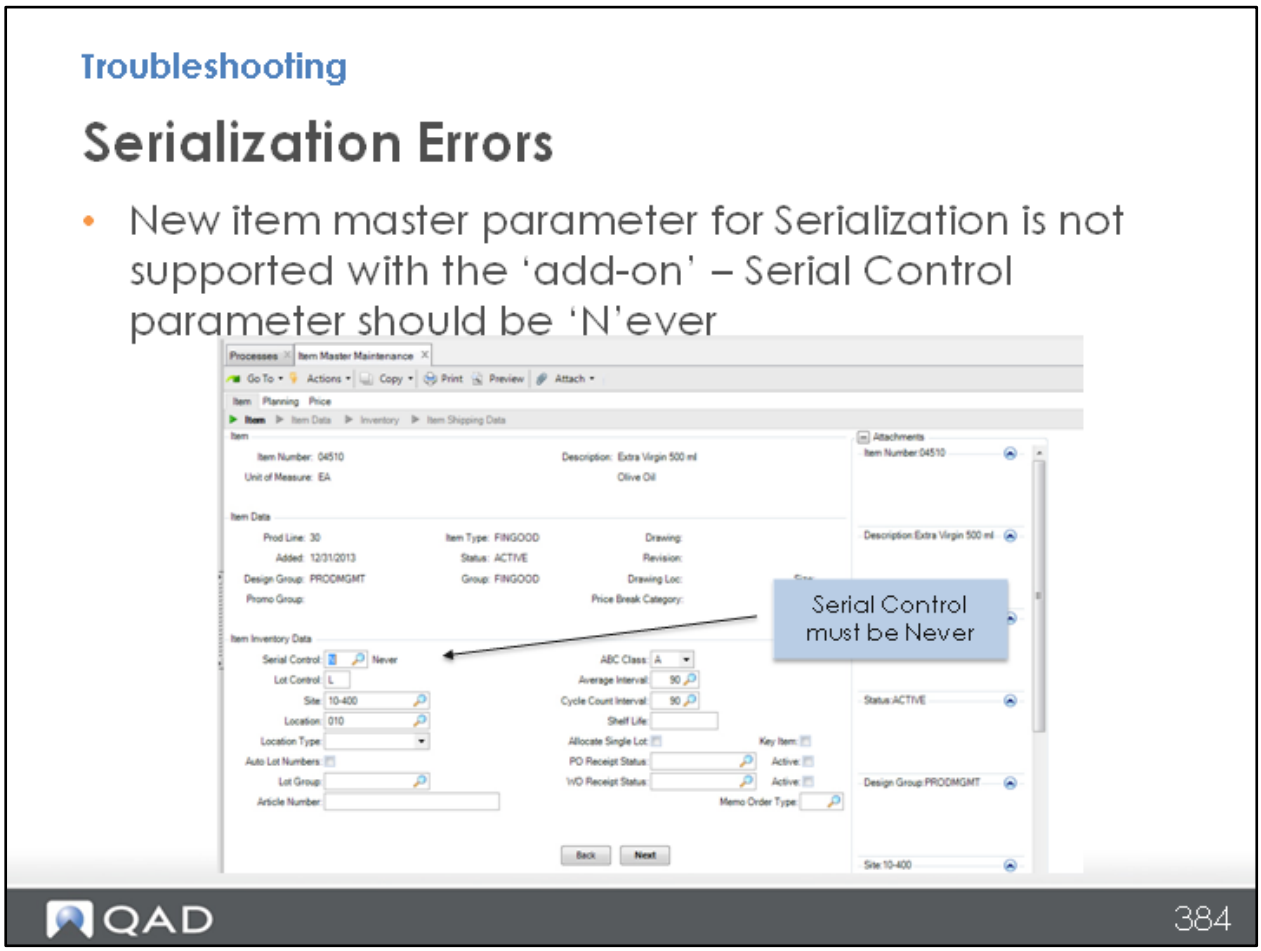


Error with Inventory and Allocation Functions



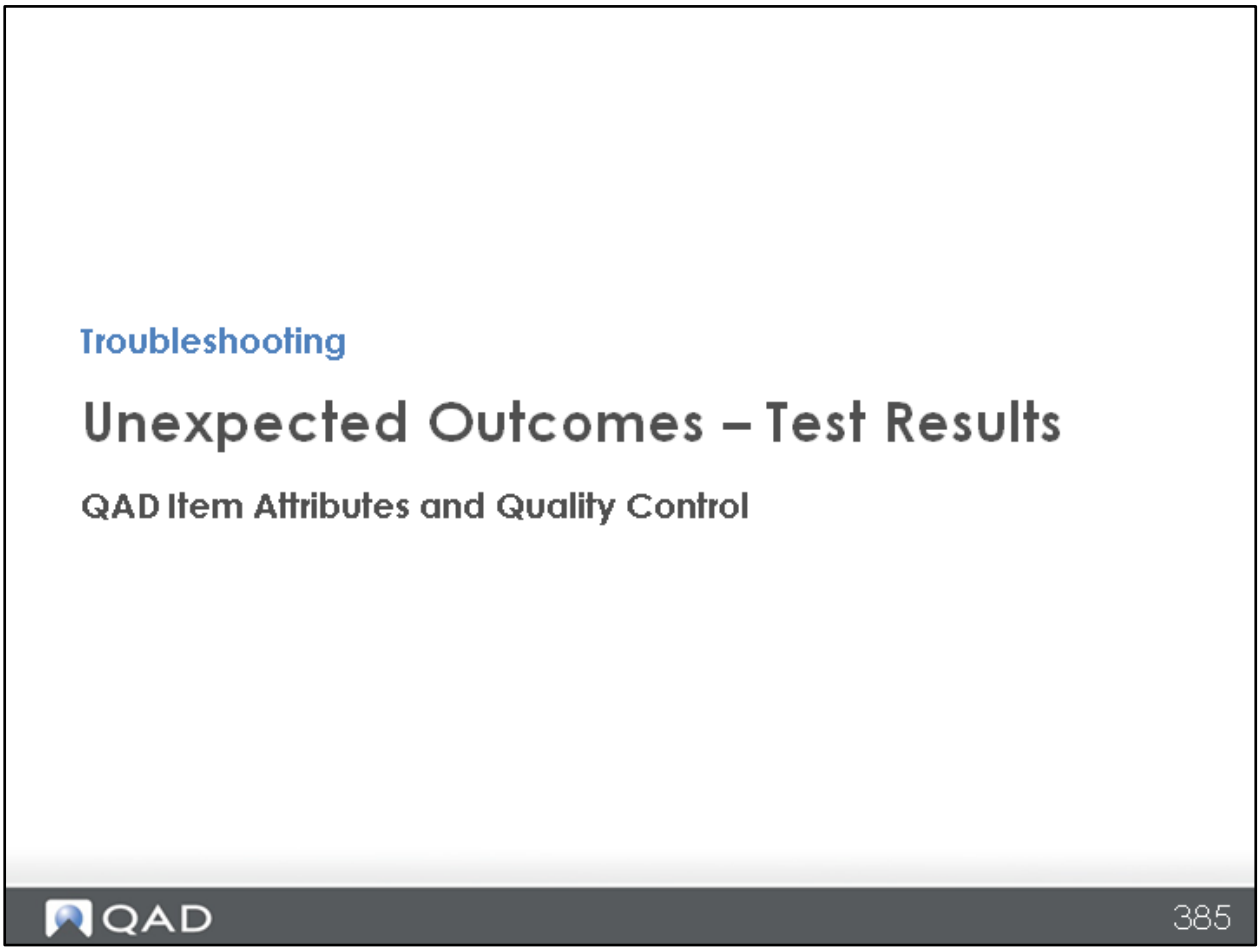
Errors will occur when an item is set up with Serial Control = “Mandatory”

Serialization Errors

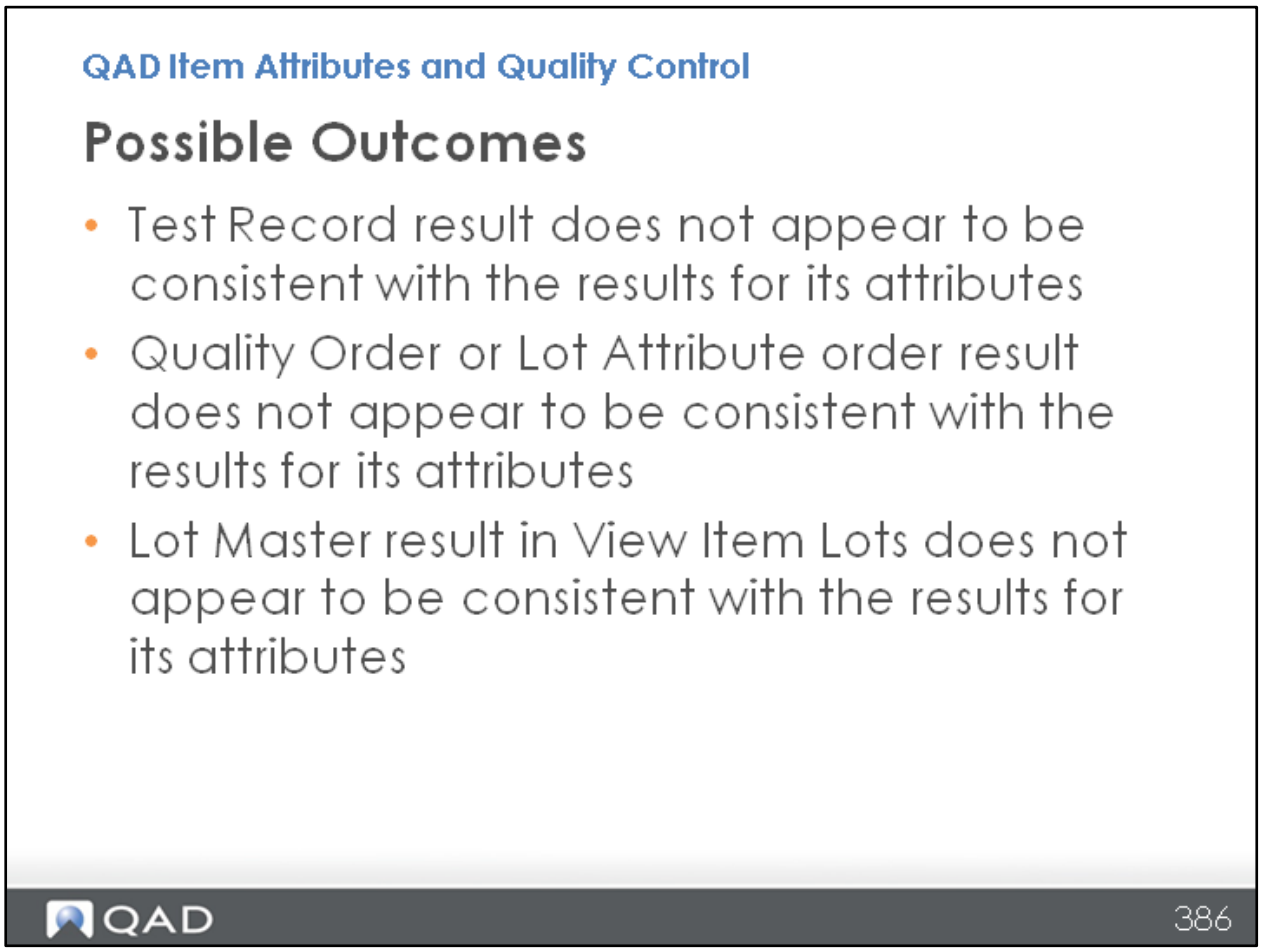


The Serial Control parameter is used by the Serialization module which is not yet available. It requires different sets of functions for inventory transactions, allocations, and picklists that support 'Pack' quantities.

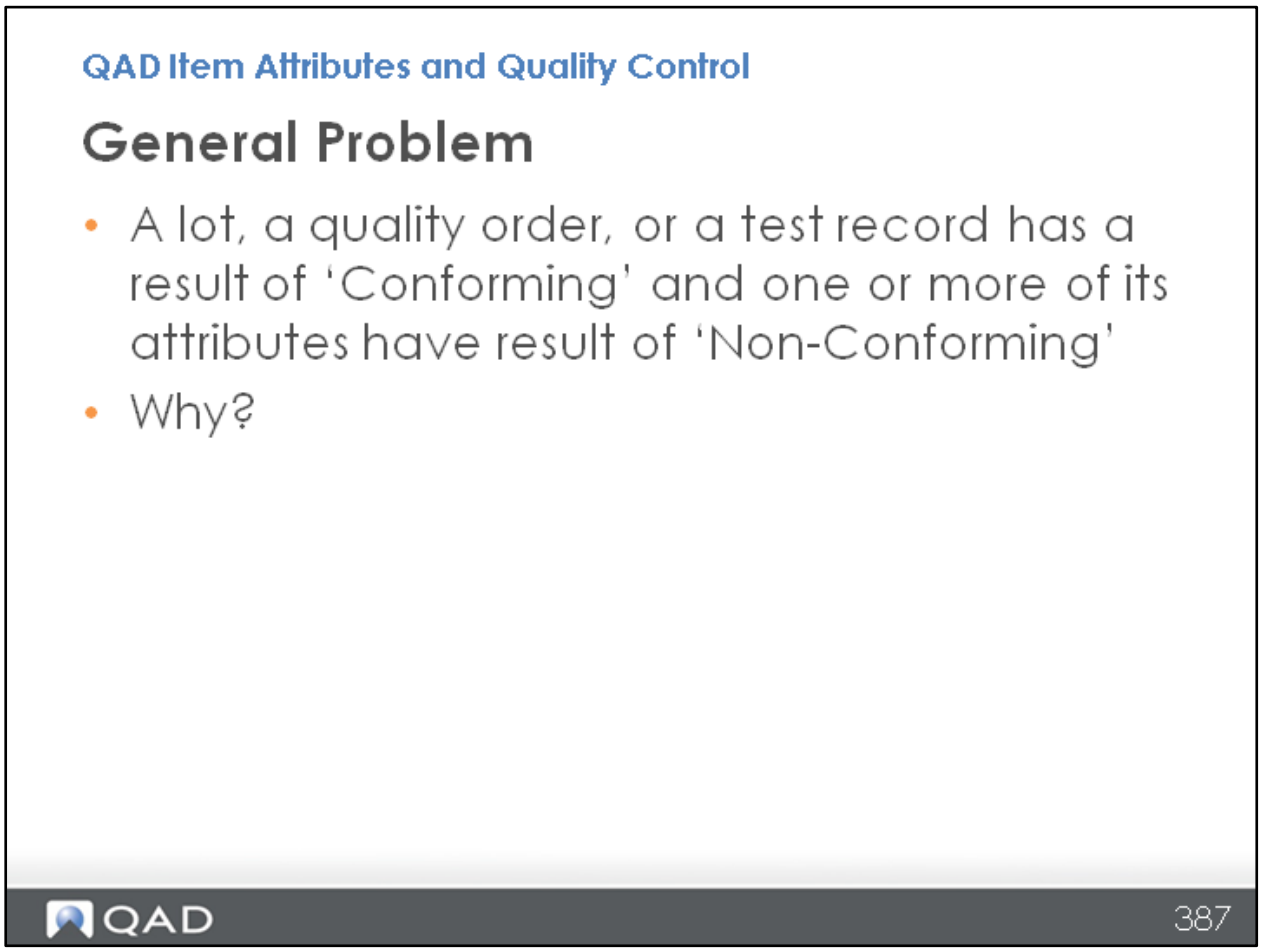
Unexpected Outcomes – Test Results



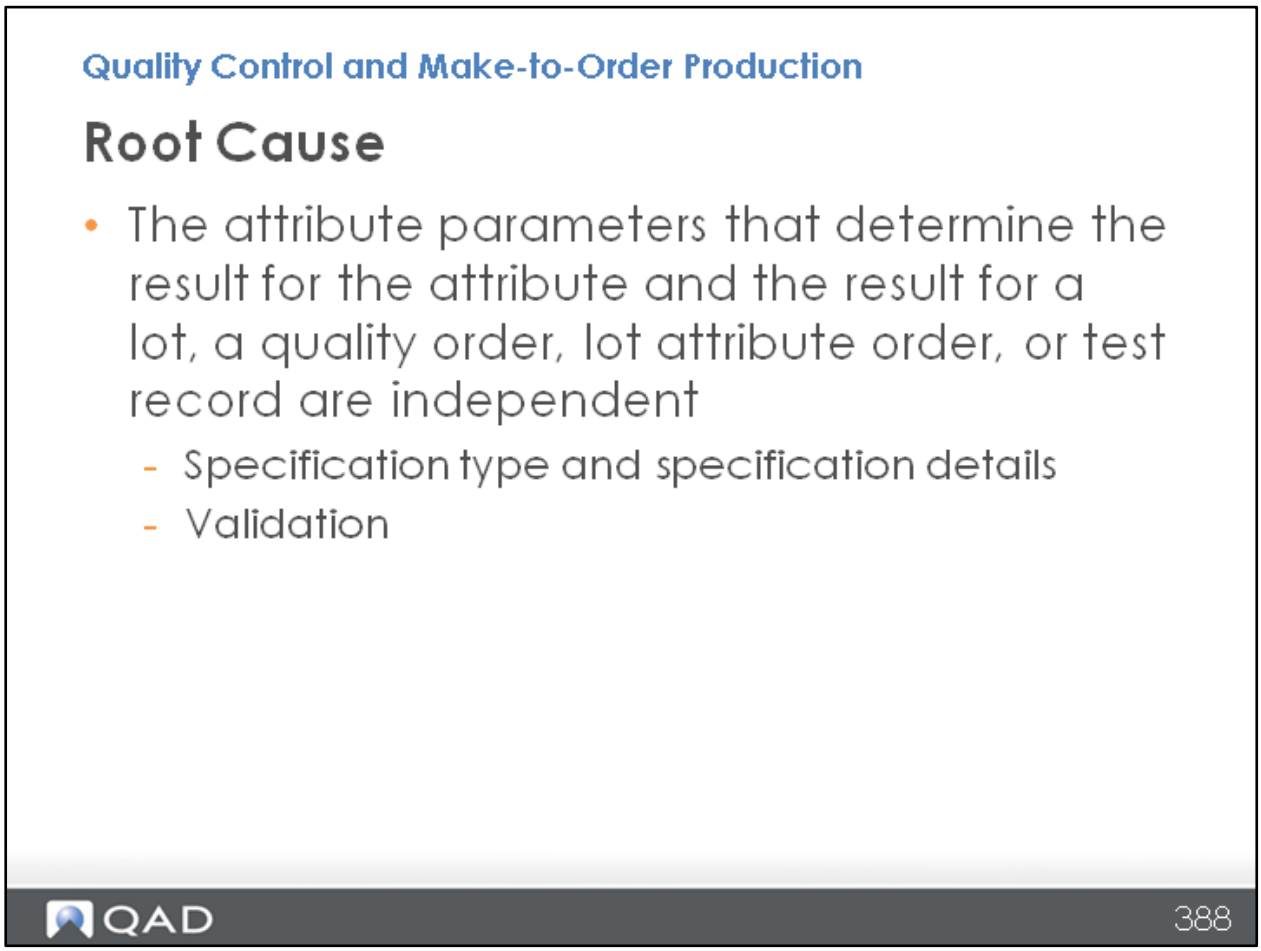
Possible Outcomes



General Problem



Root Cause


Quality Control and Make-to-Order Production
Root Cause
• The attribute parameters that determine the result for the attribute and the result for a lot, a quality order, lot attribute order, or test record are independent
- Specification type and specification details
- Validation
QAD
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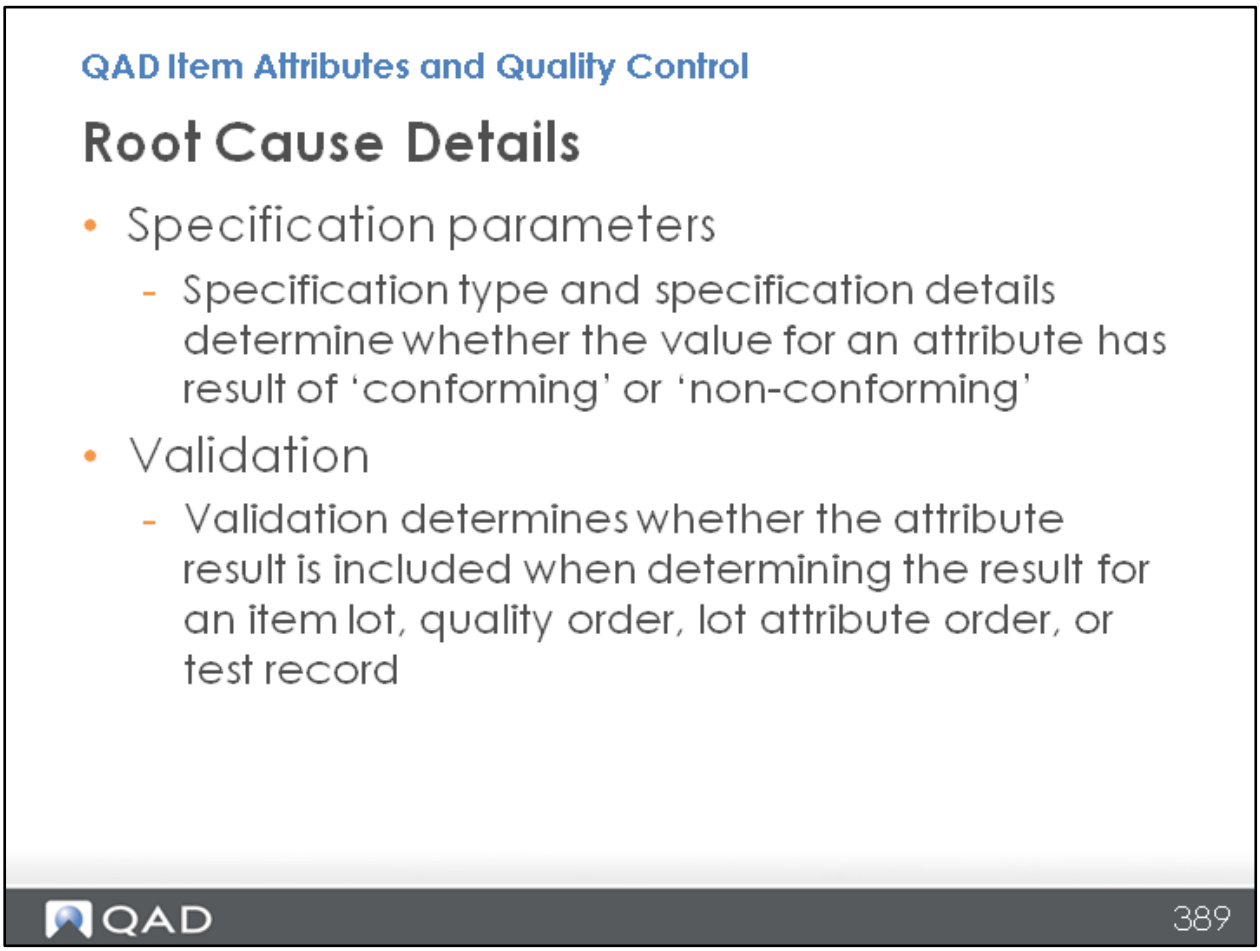
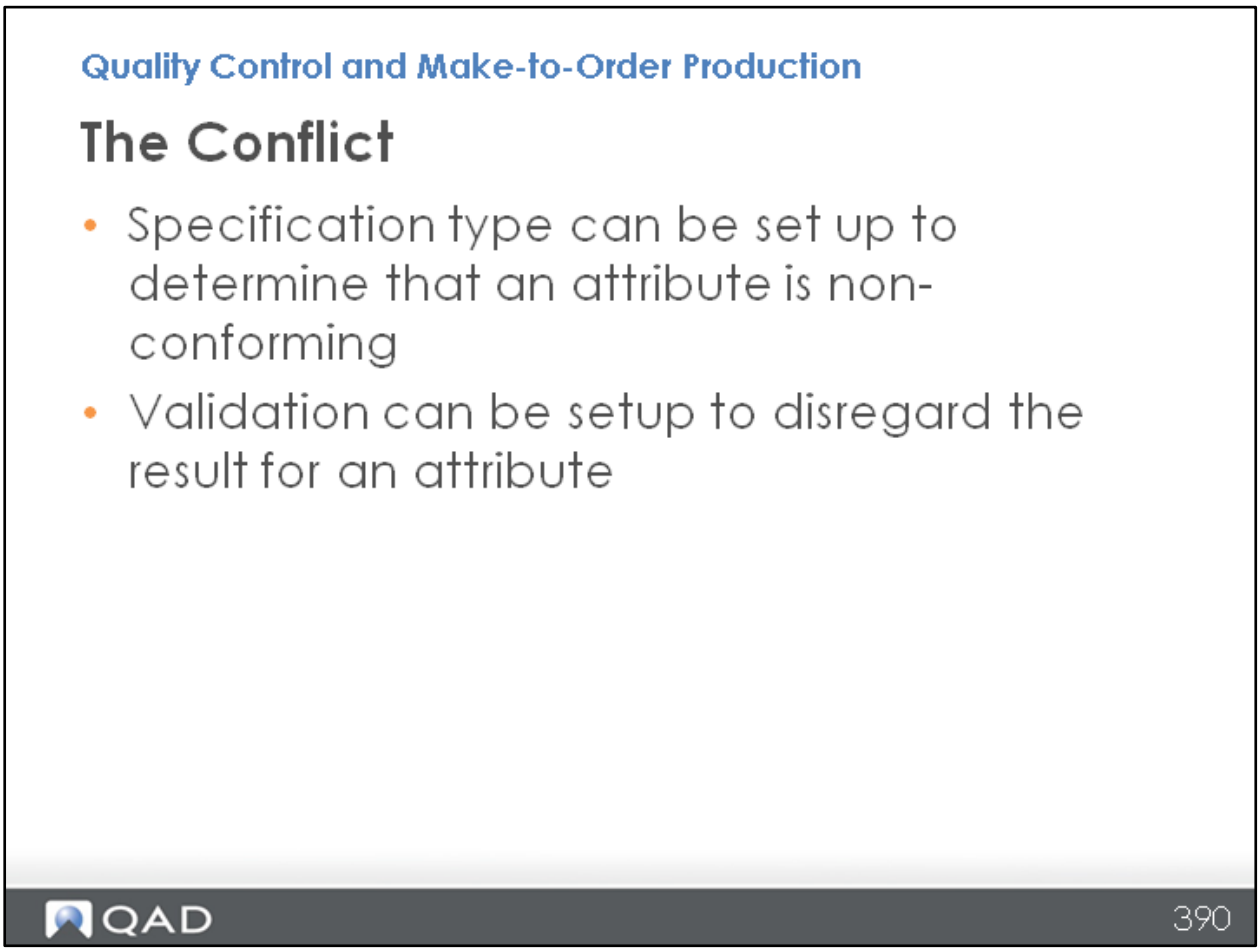
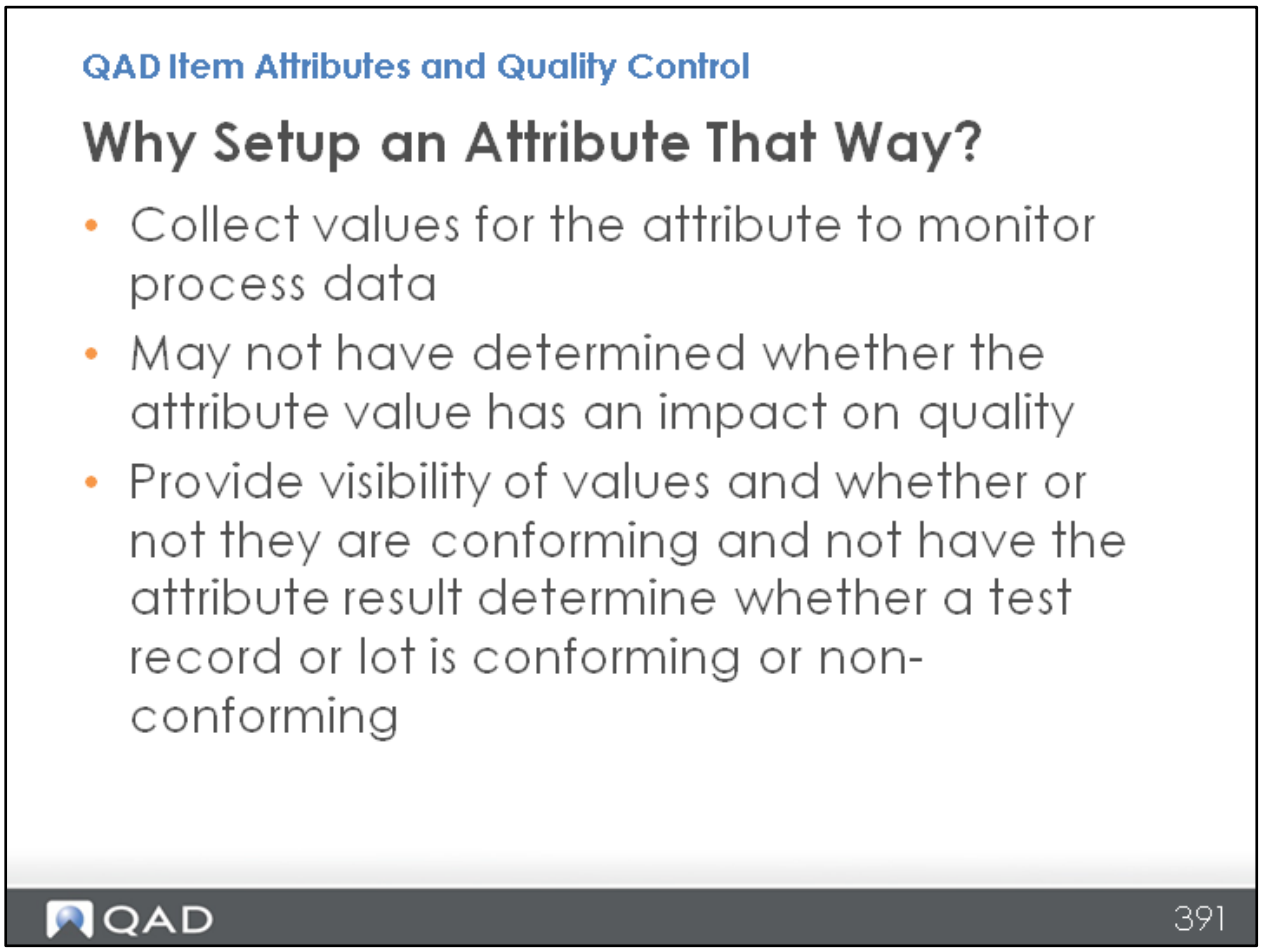
Root Cause Details



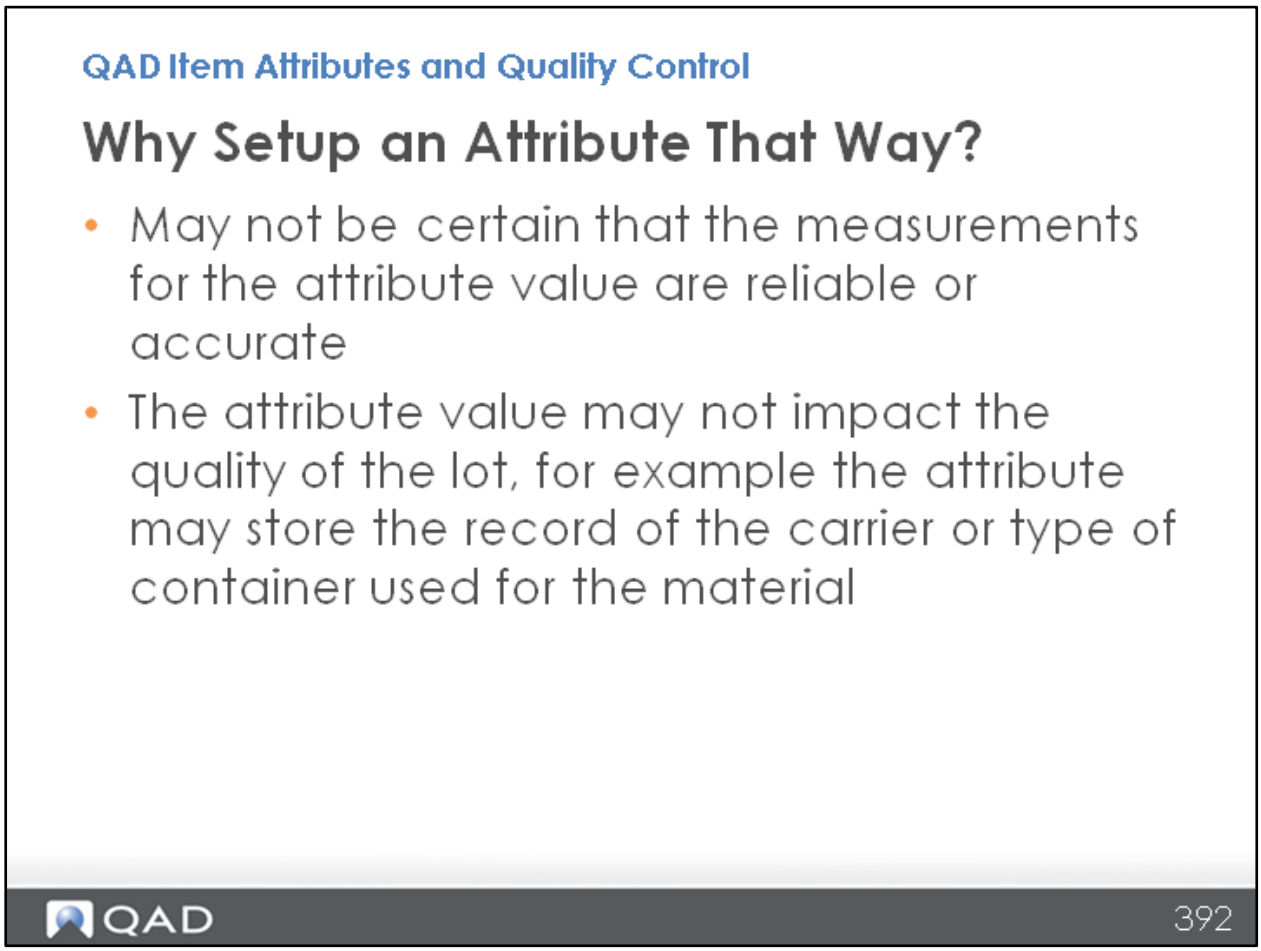
The Conflict



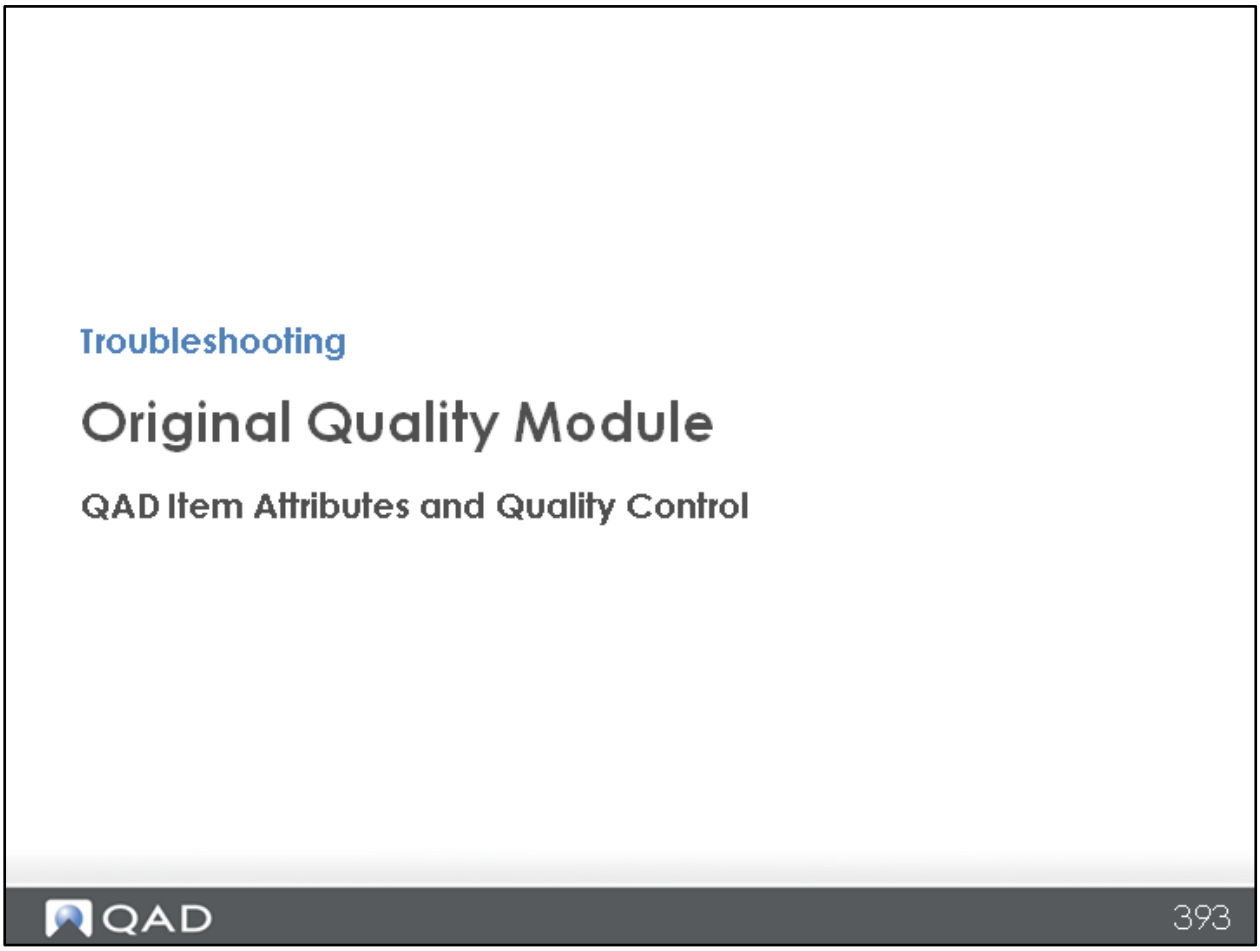
Why Setup an Attribute That Way?



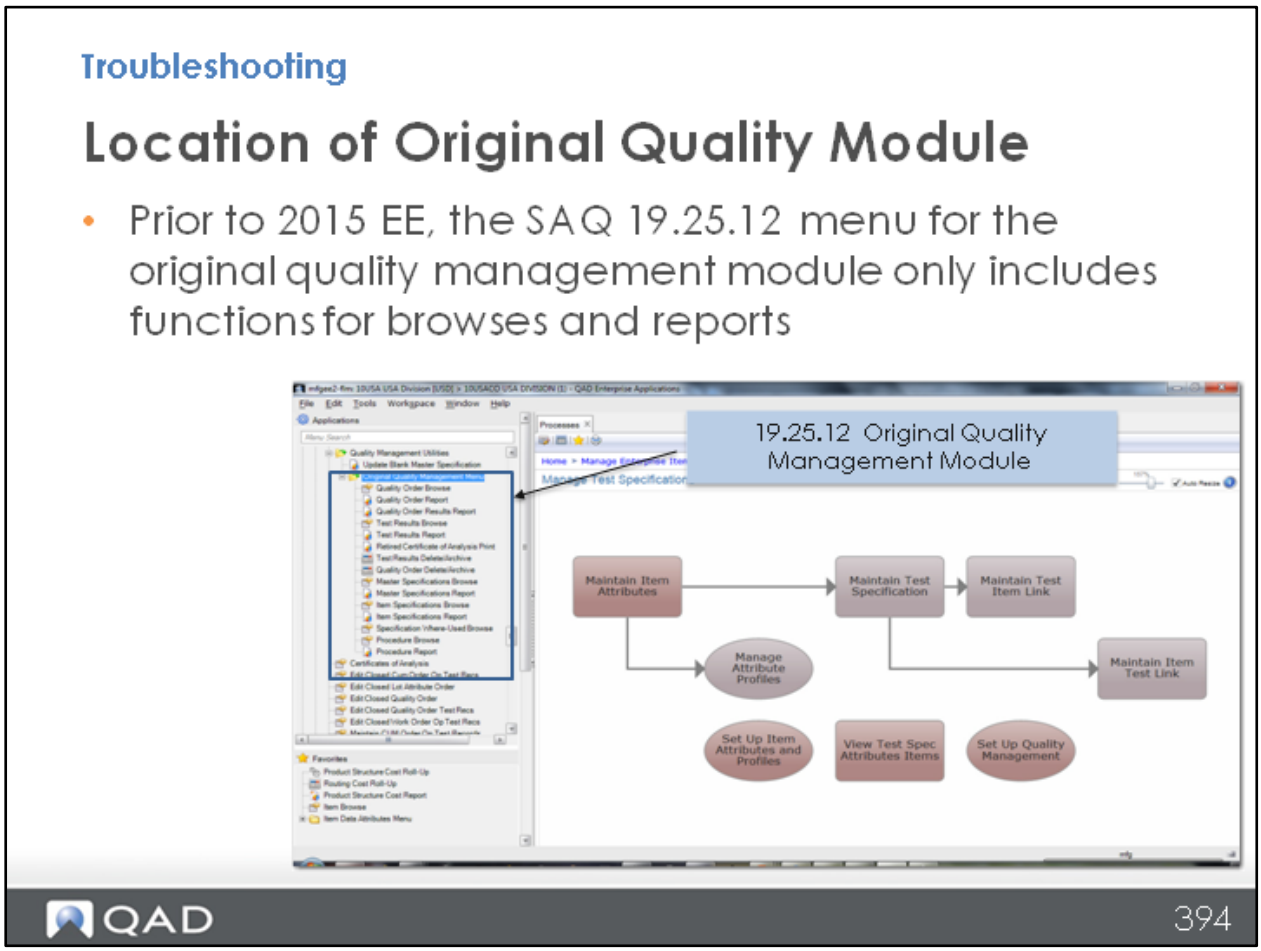
Why Setup an Attribute That Way?



Original Quality Module

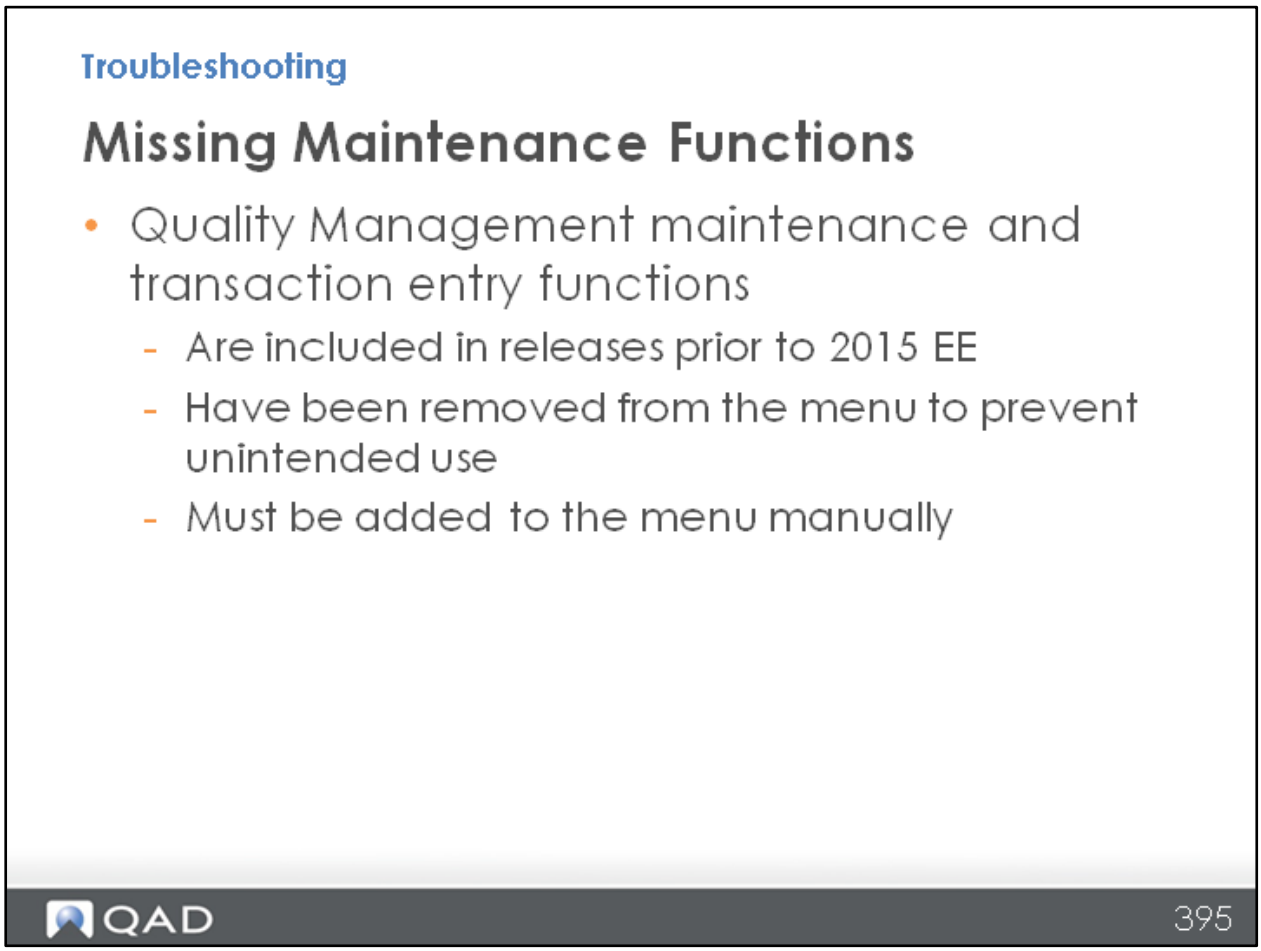


Location of Original Quality Module



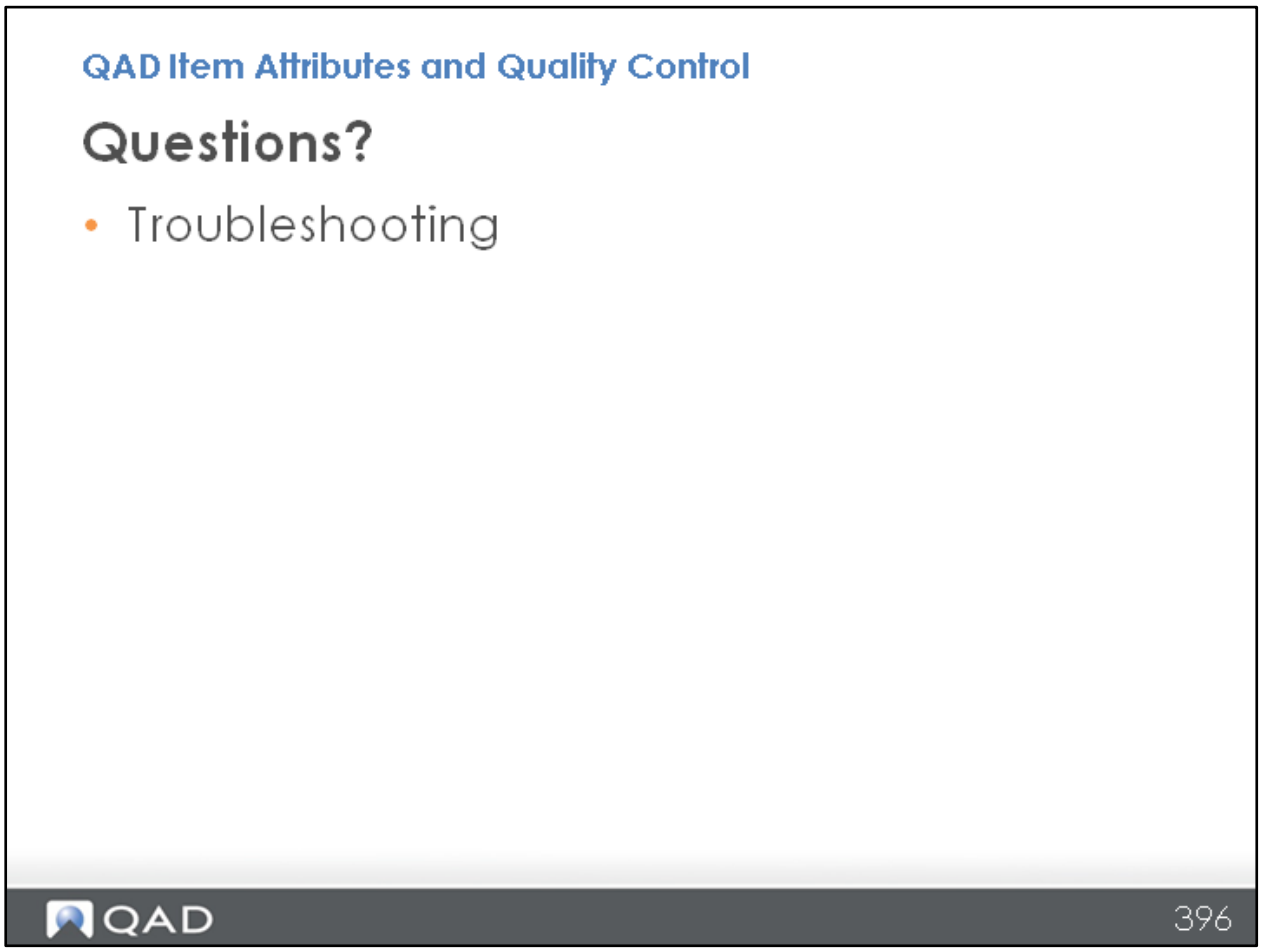
Many but not all functions in the original Quality Management module can be found on menu 19.25.12

Missing Maintenance Functions



Maintenance and transactions functions are included in the release but must be added to the menu manually

Questions?


QAD Item Attributes and Quality Control
Questions?
• Troubleshooting
QAD
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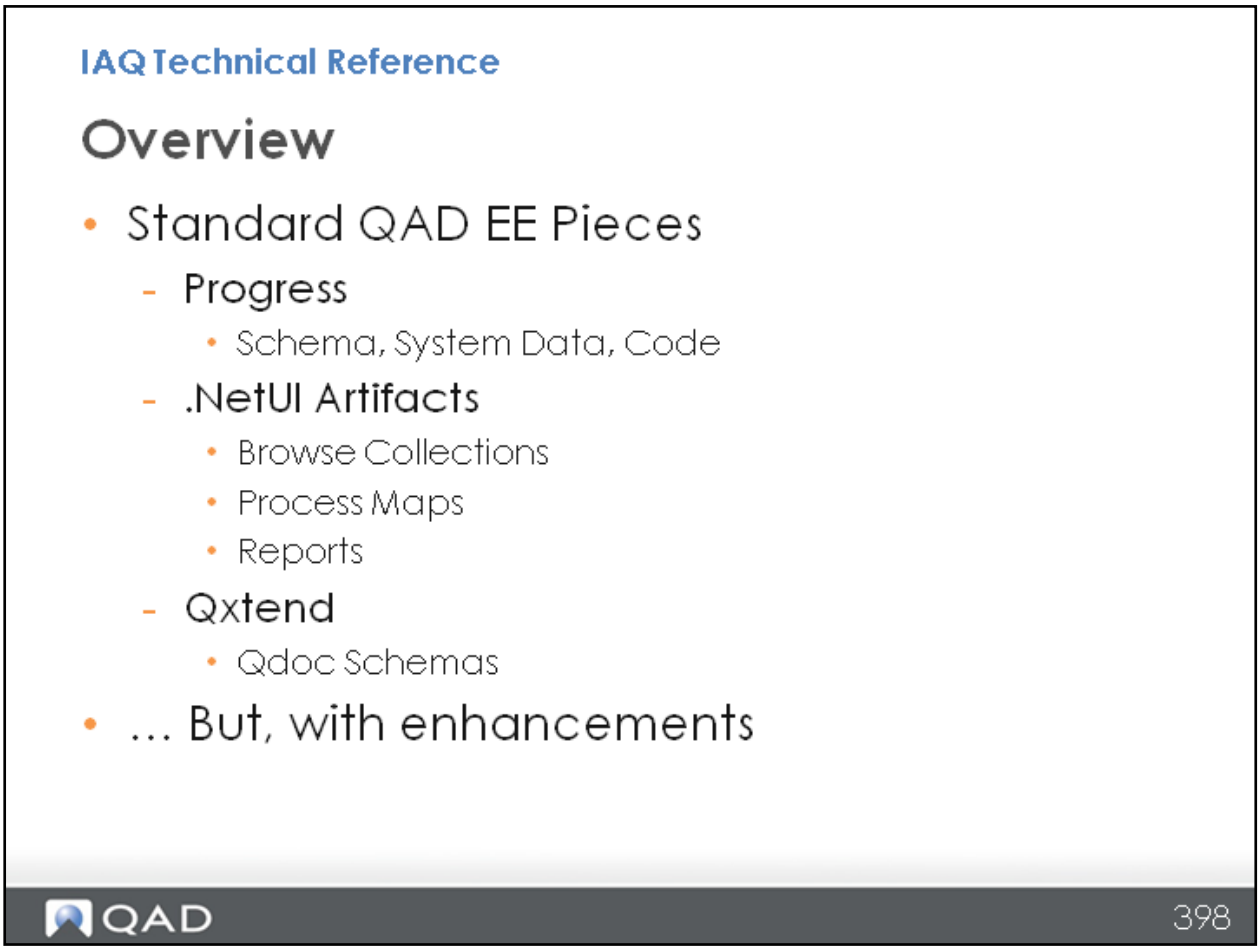
CHAPTER 15

IAQ Technical Reference

Overview


IAQ Technical Reference
Overview
Standard QAD EE Pieces
Progress
Schema, System Data, Code
.NetUI Artifacts
Browse Collections
Process Maps
Reports
Qxtend
Qdoc Schemas
… But, with enhancements
QAD
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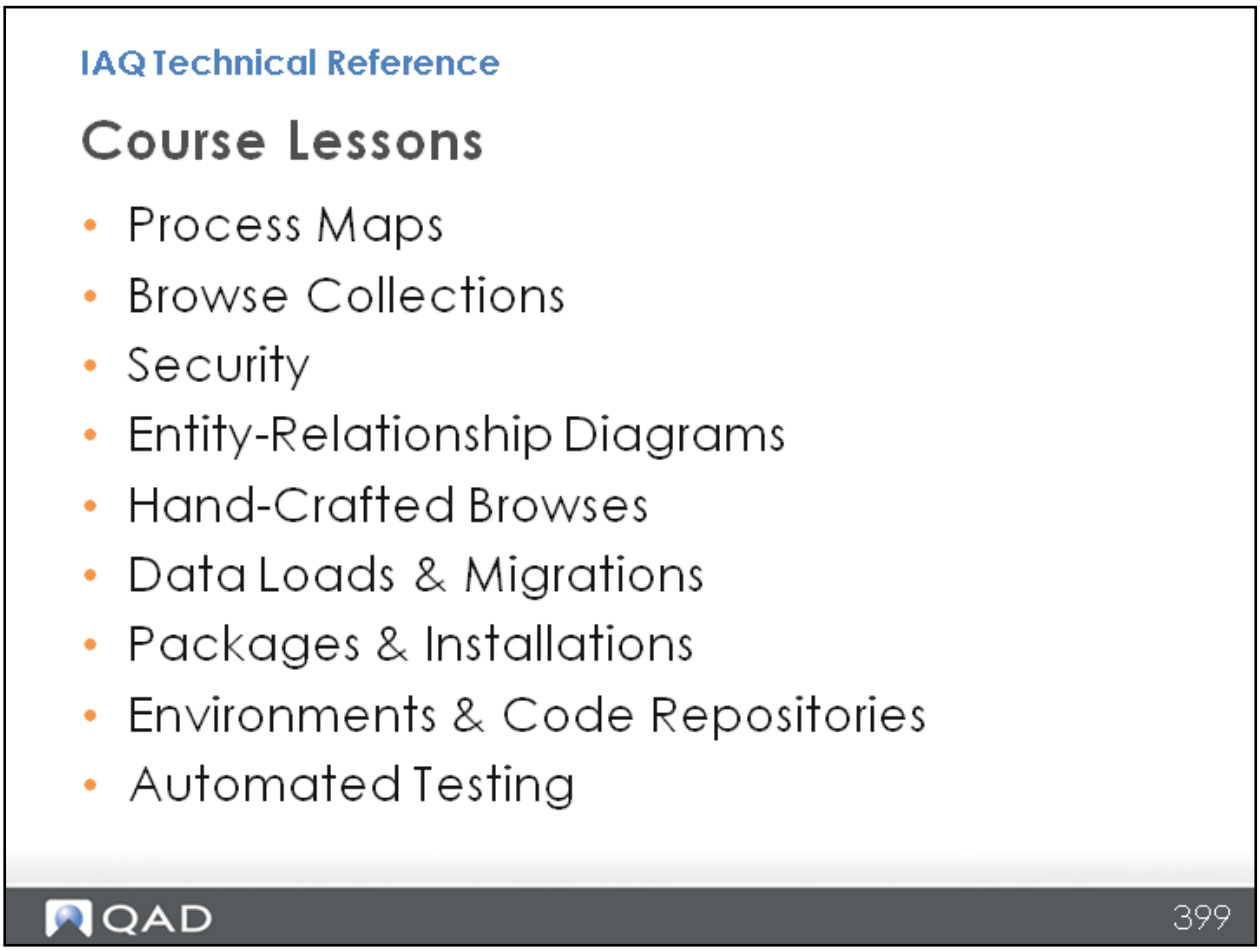
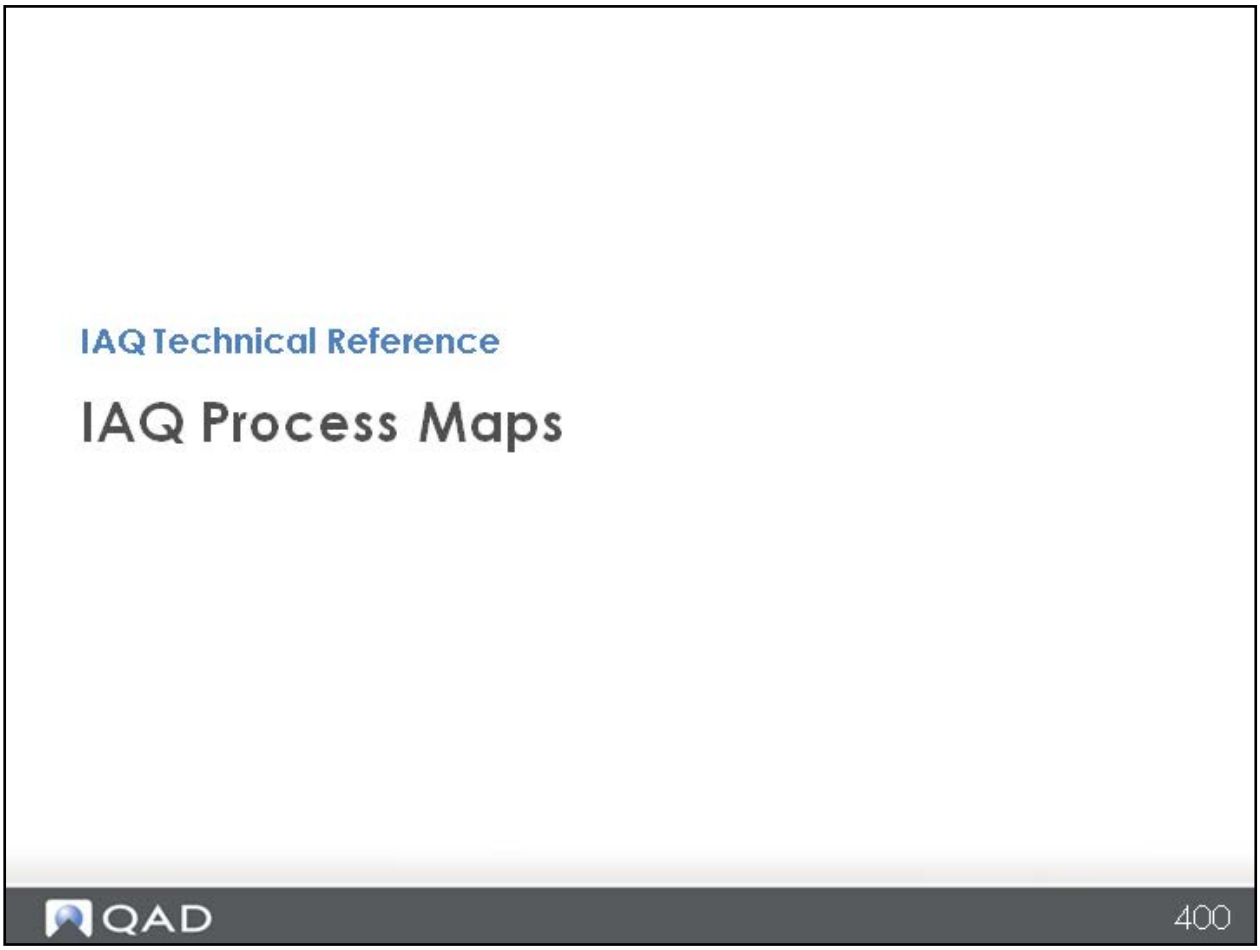
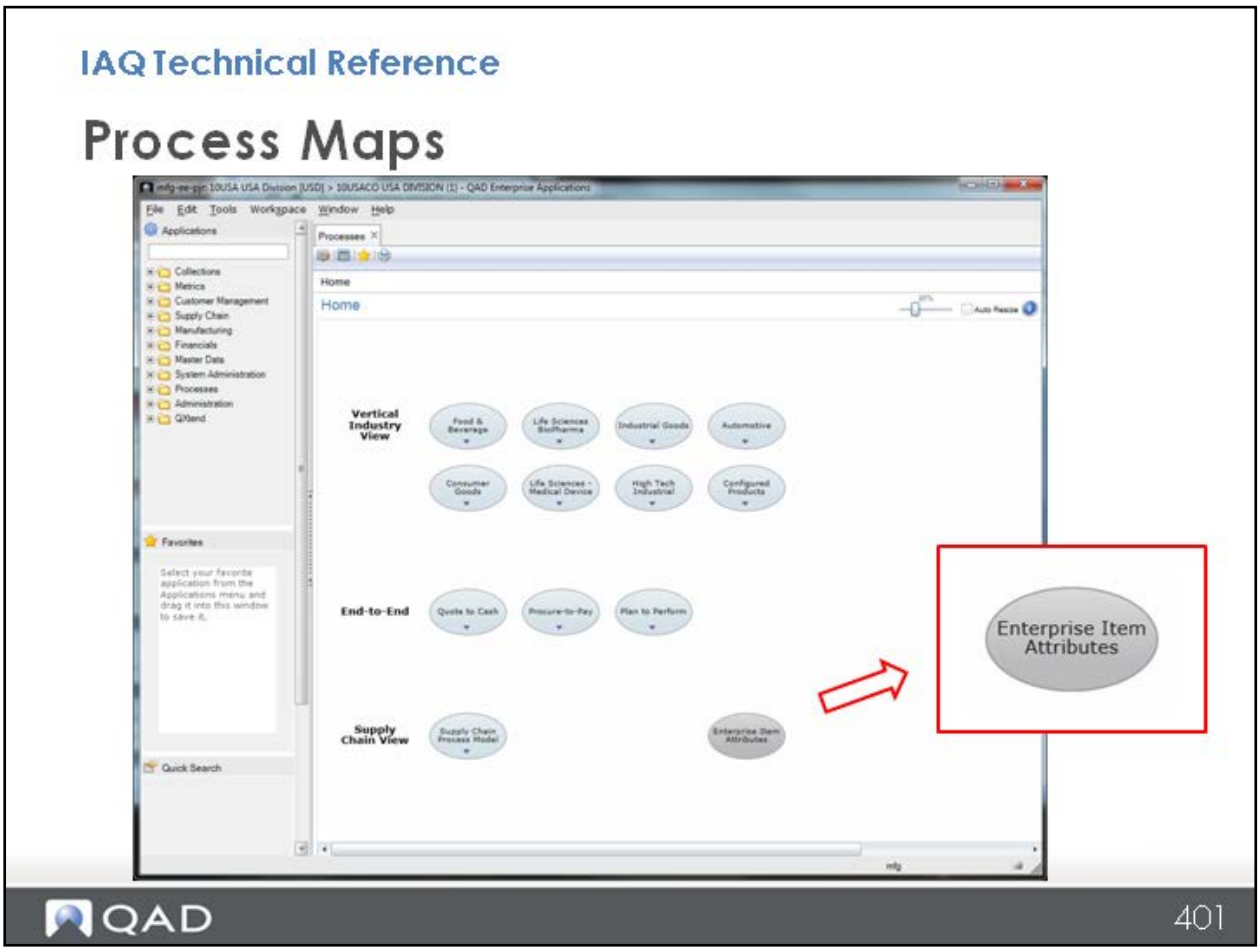
Course Lessons



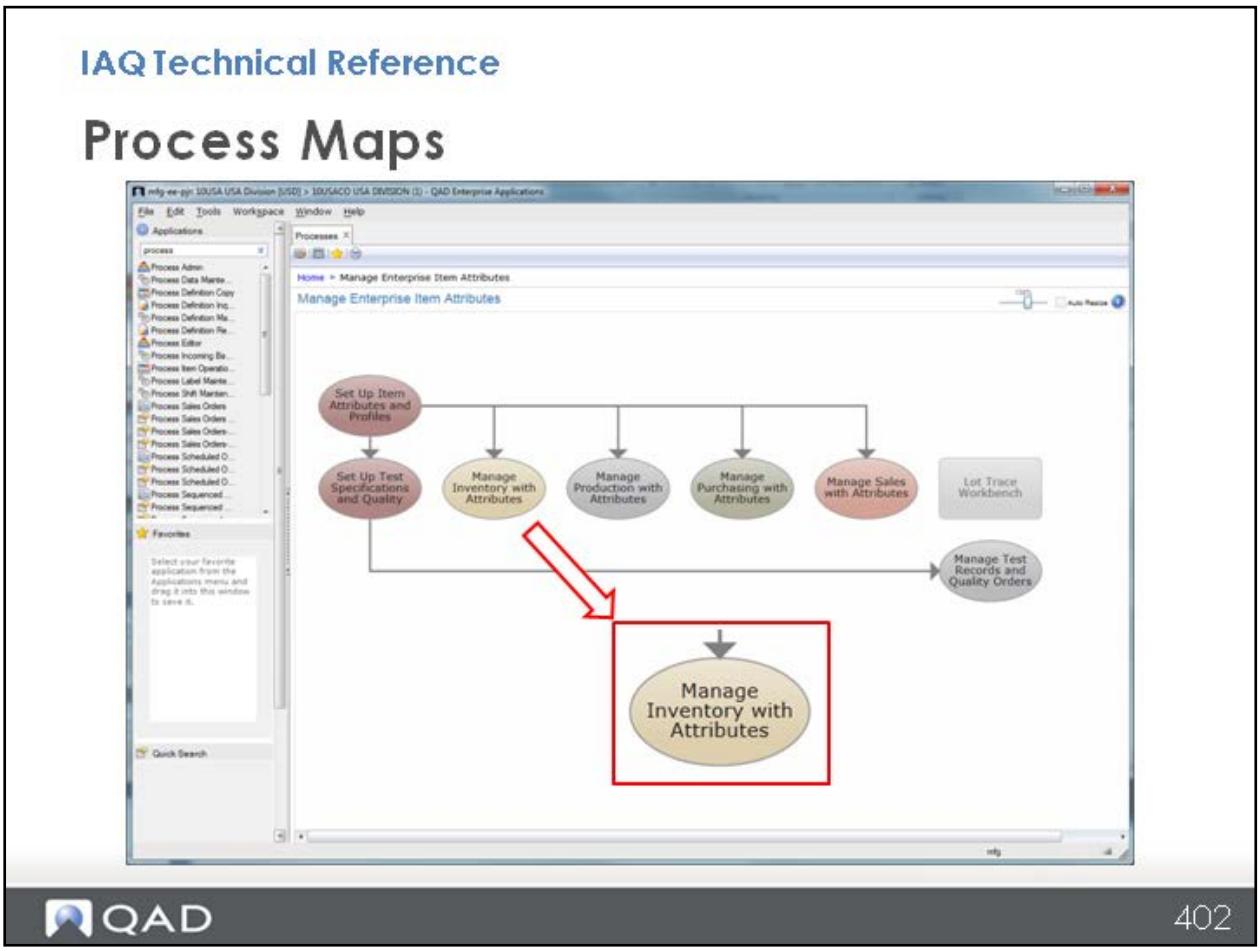
IAQ Process Maps



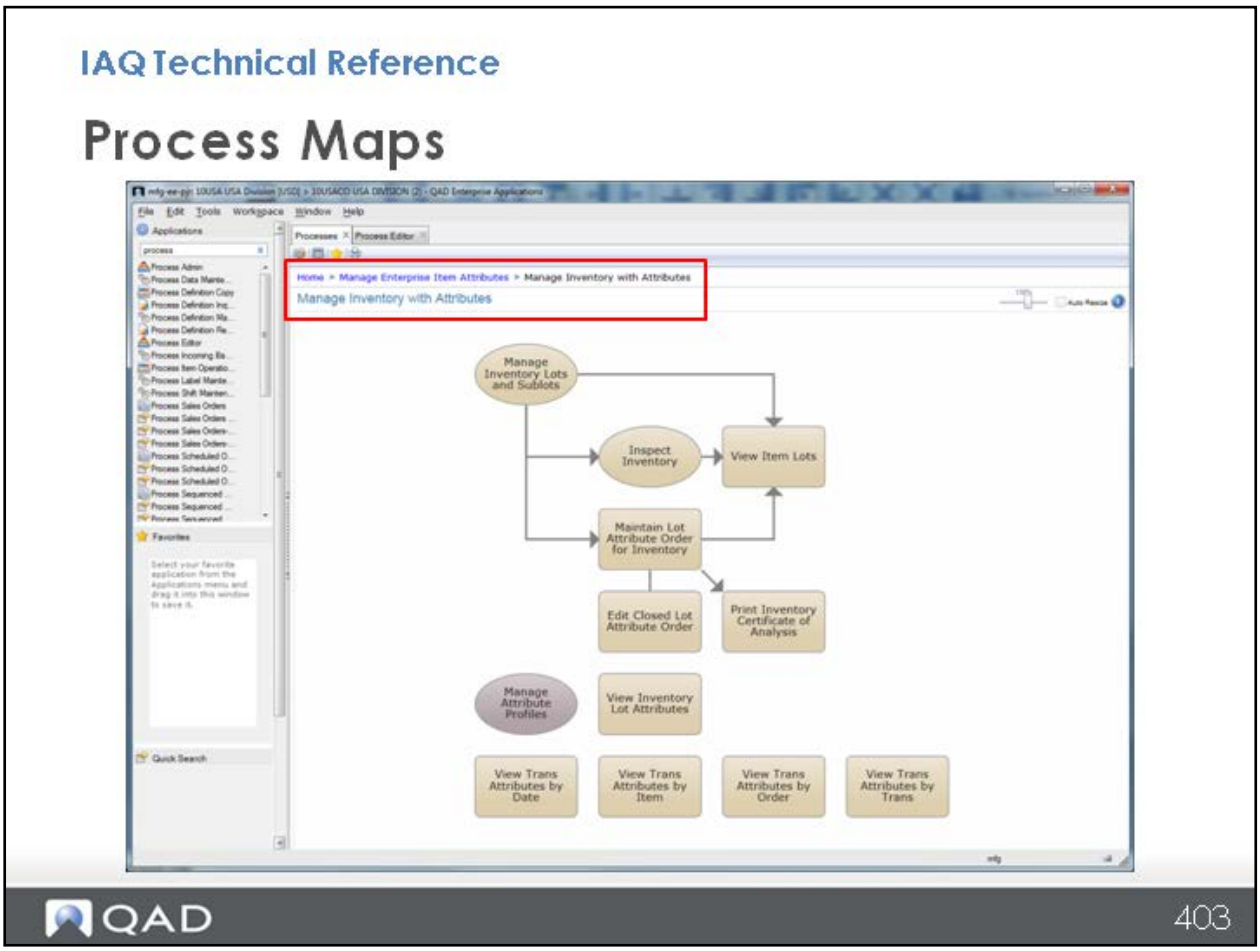
Process Maps



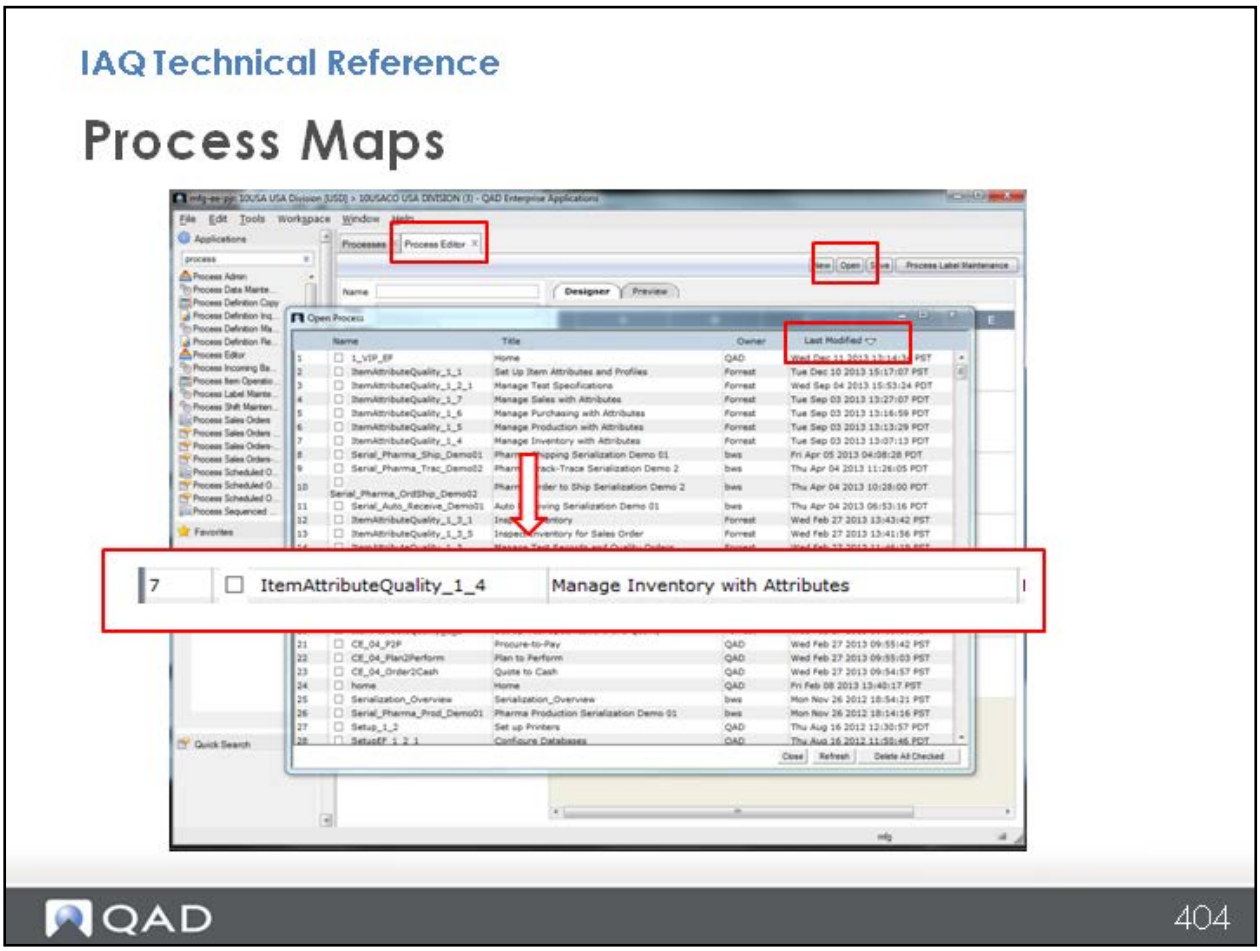
Process Maps



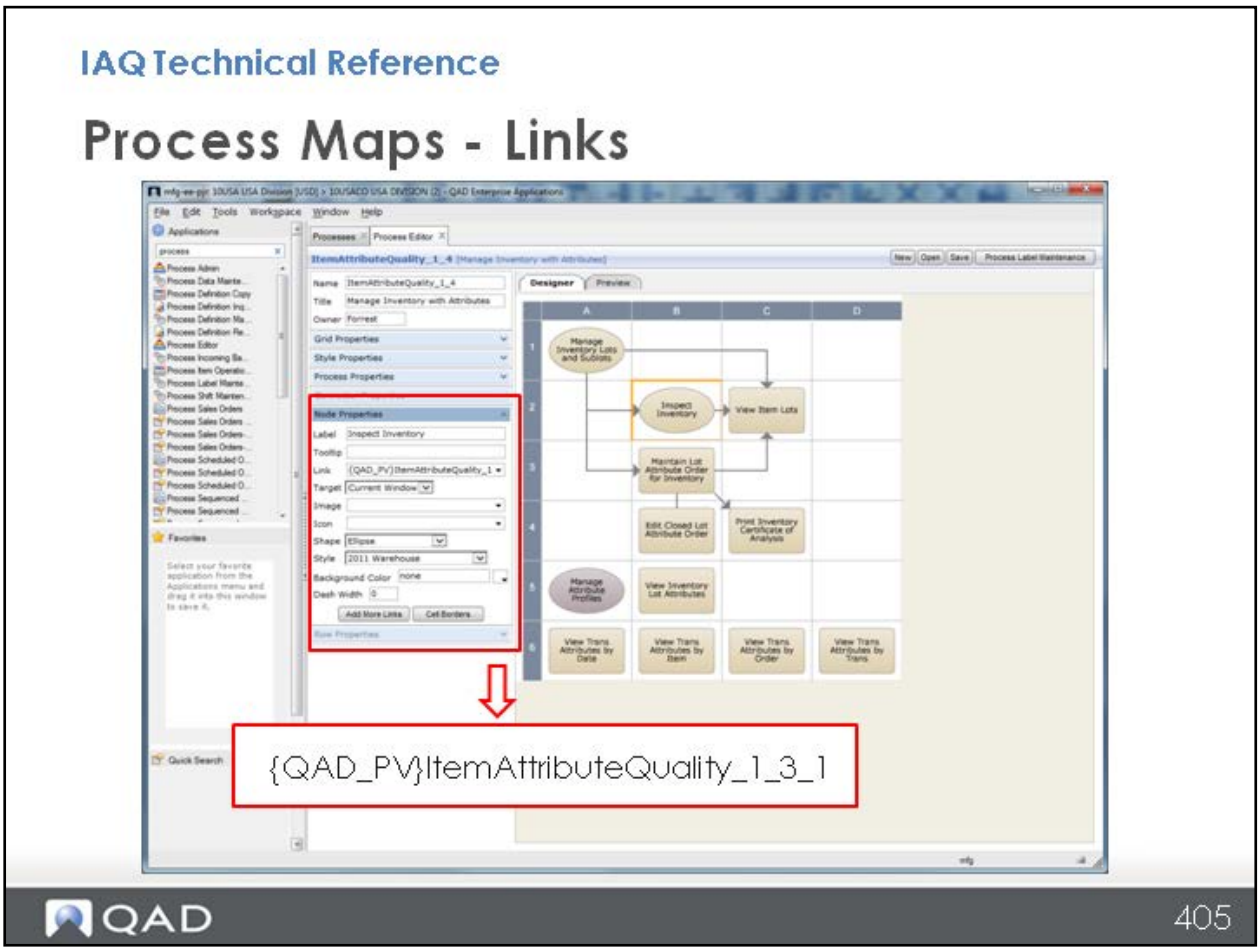
Process Maps



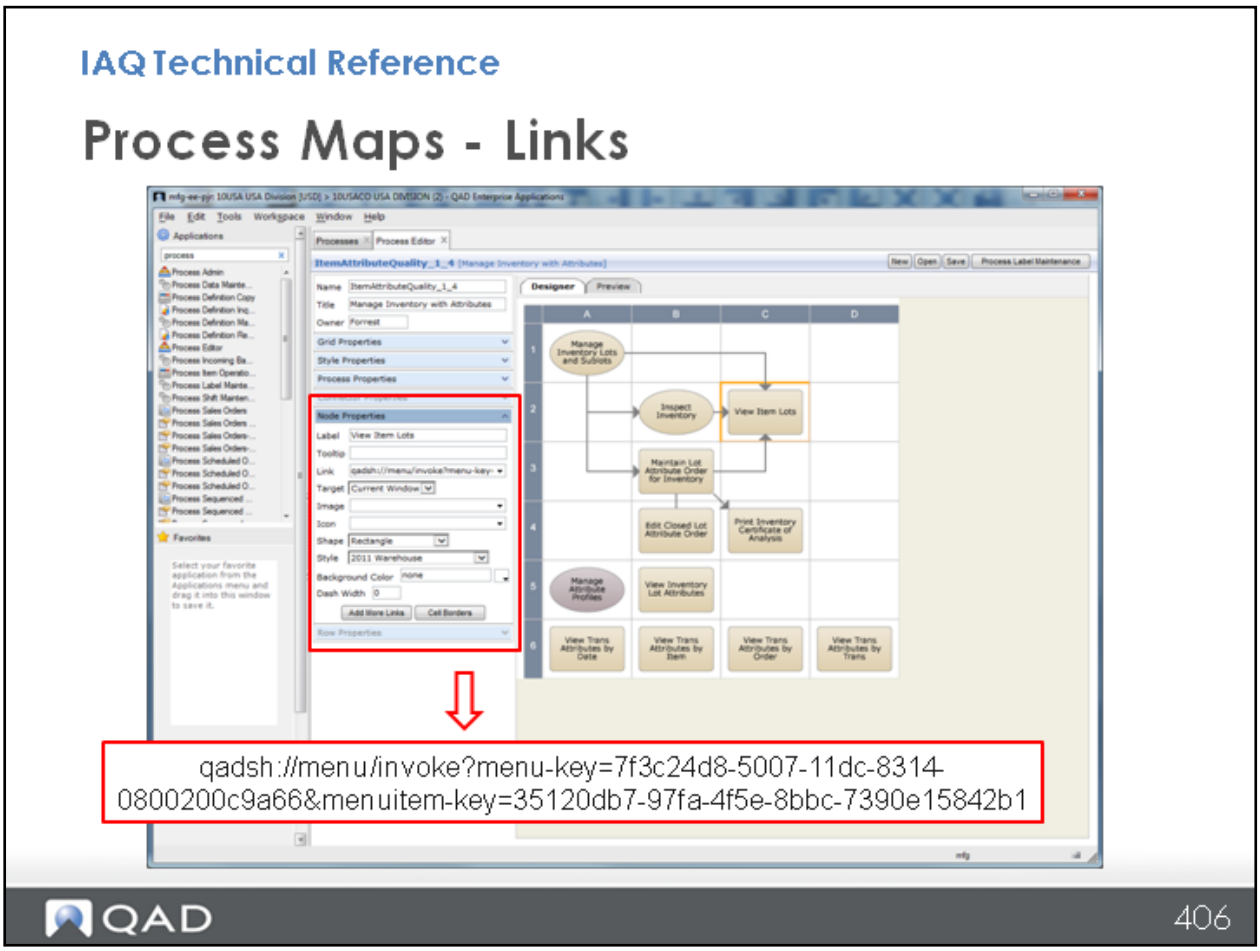
Process Maps



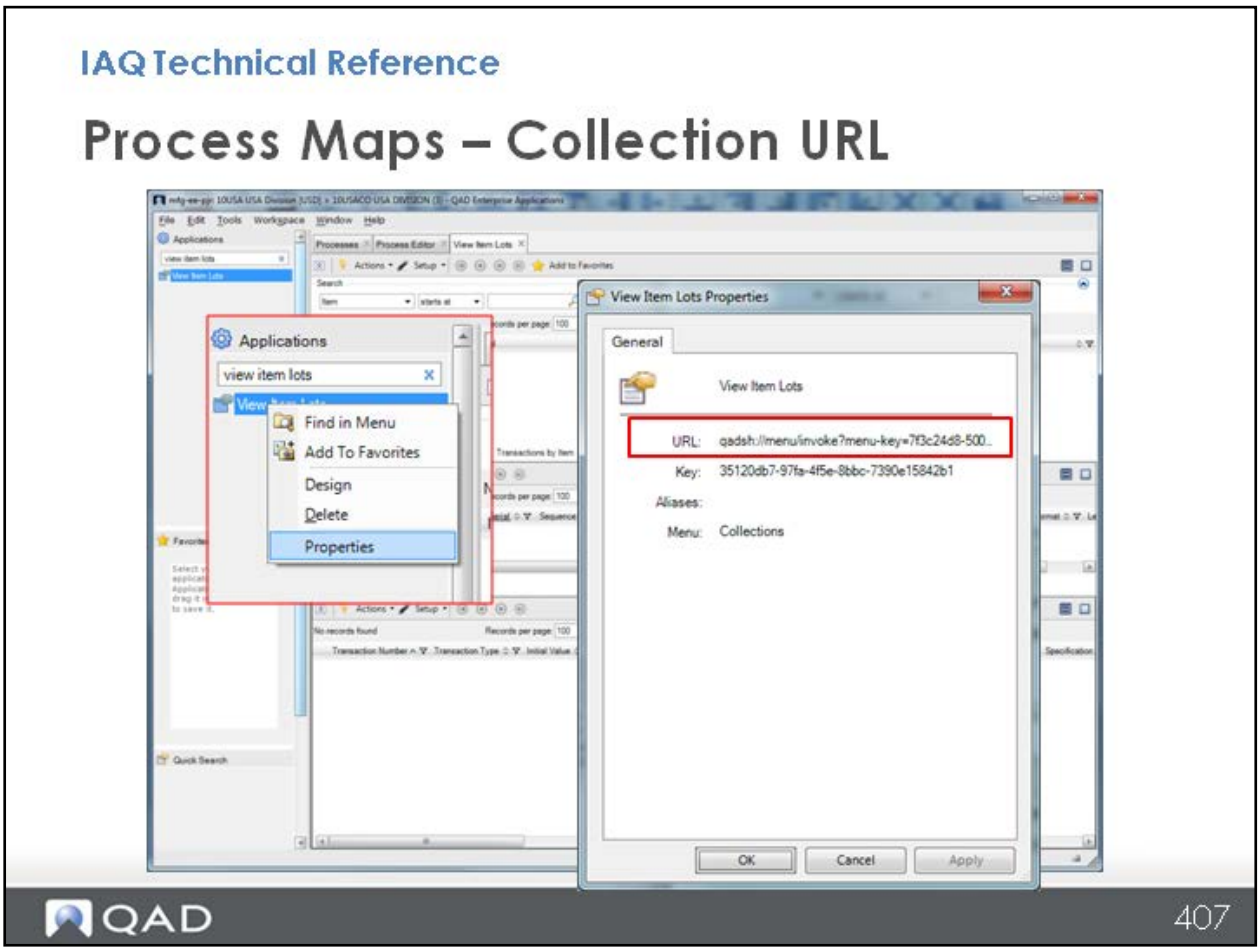
Process Maps - Links



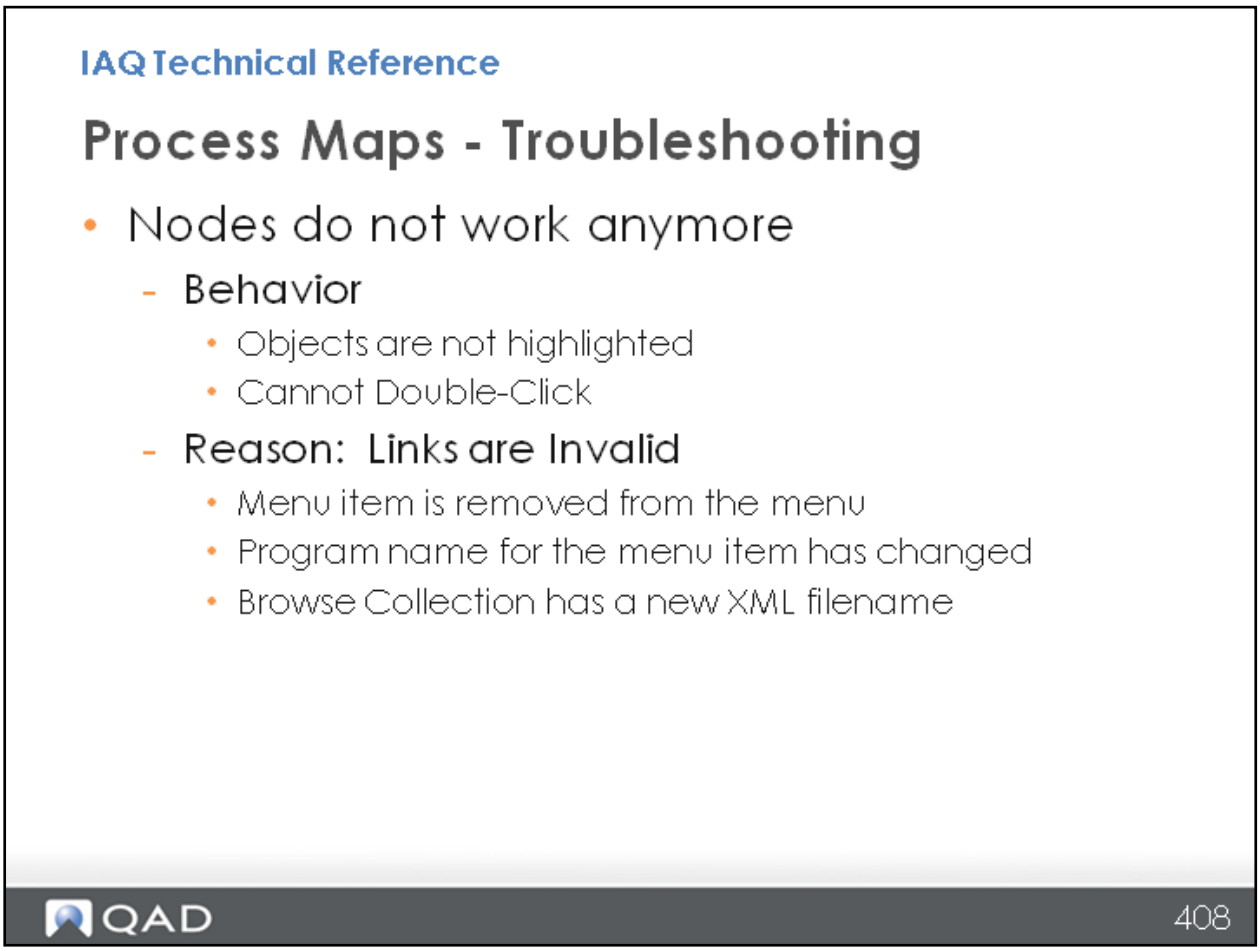
Process Maps - Links



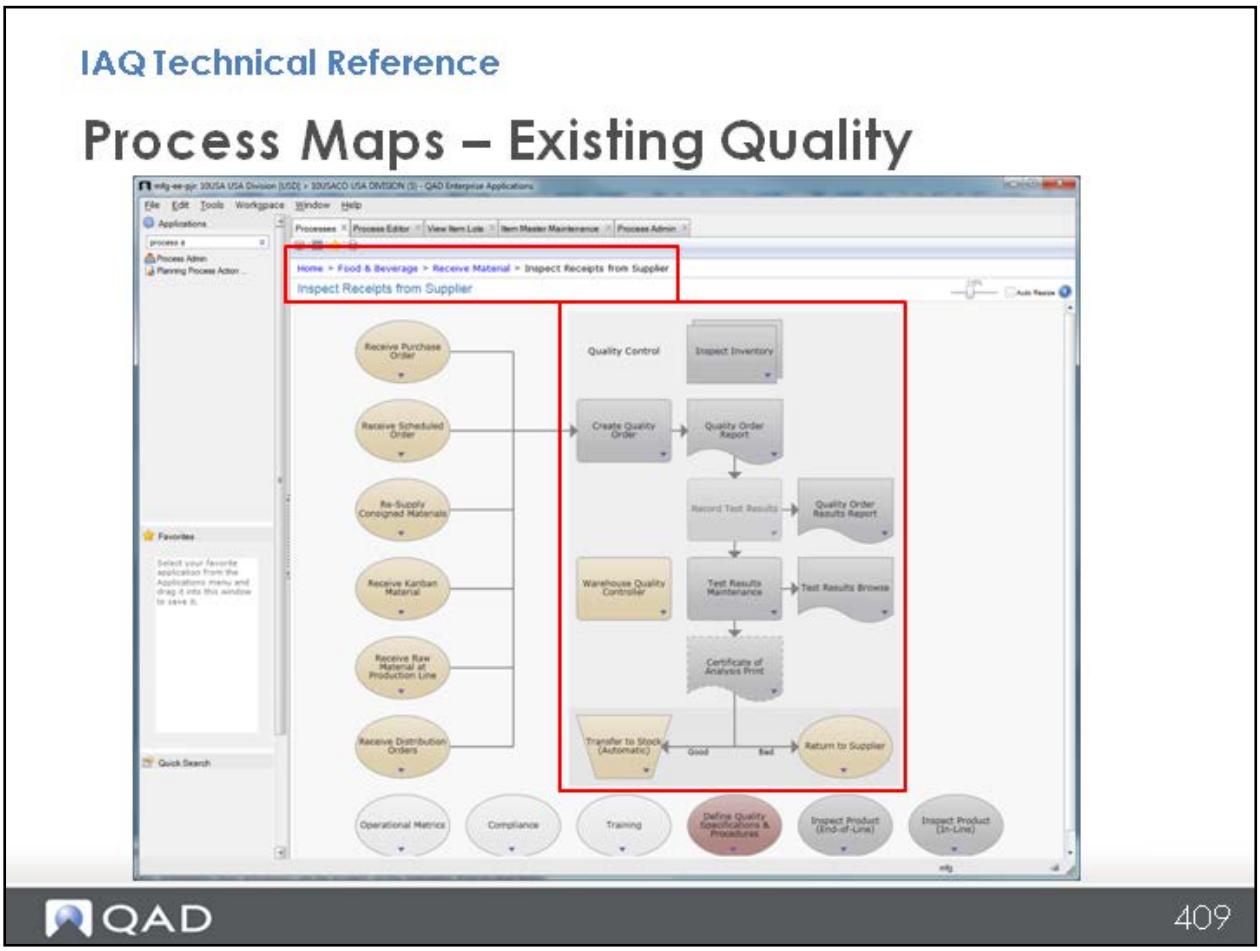
Process Maps – Collection URL



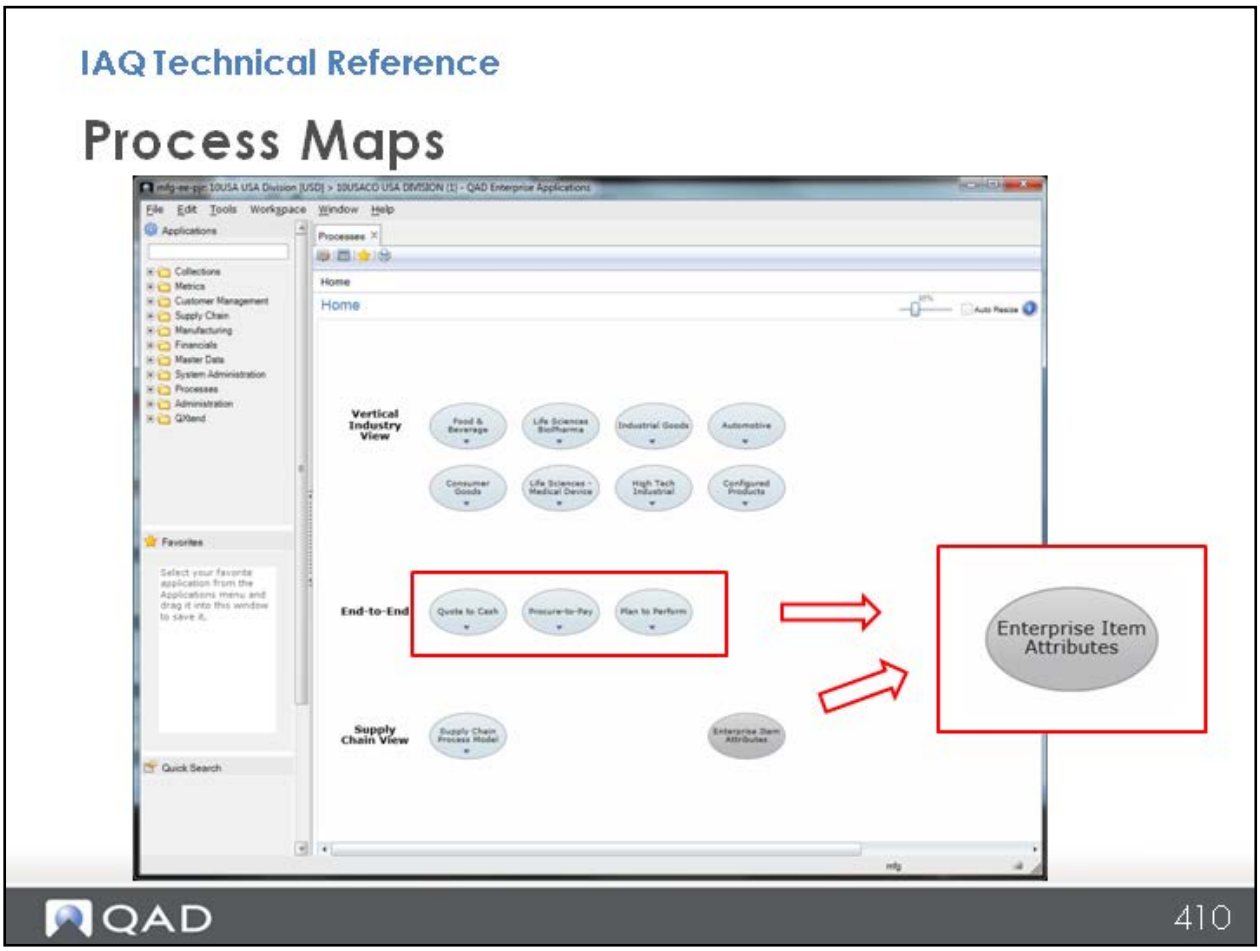
Process Maps - Troubleshooting



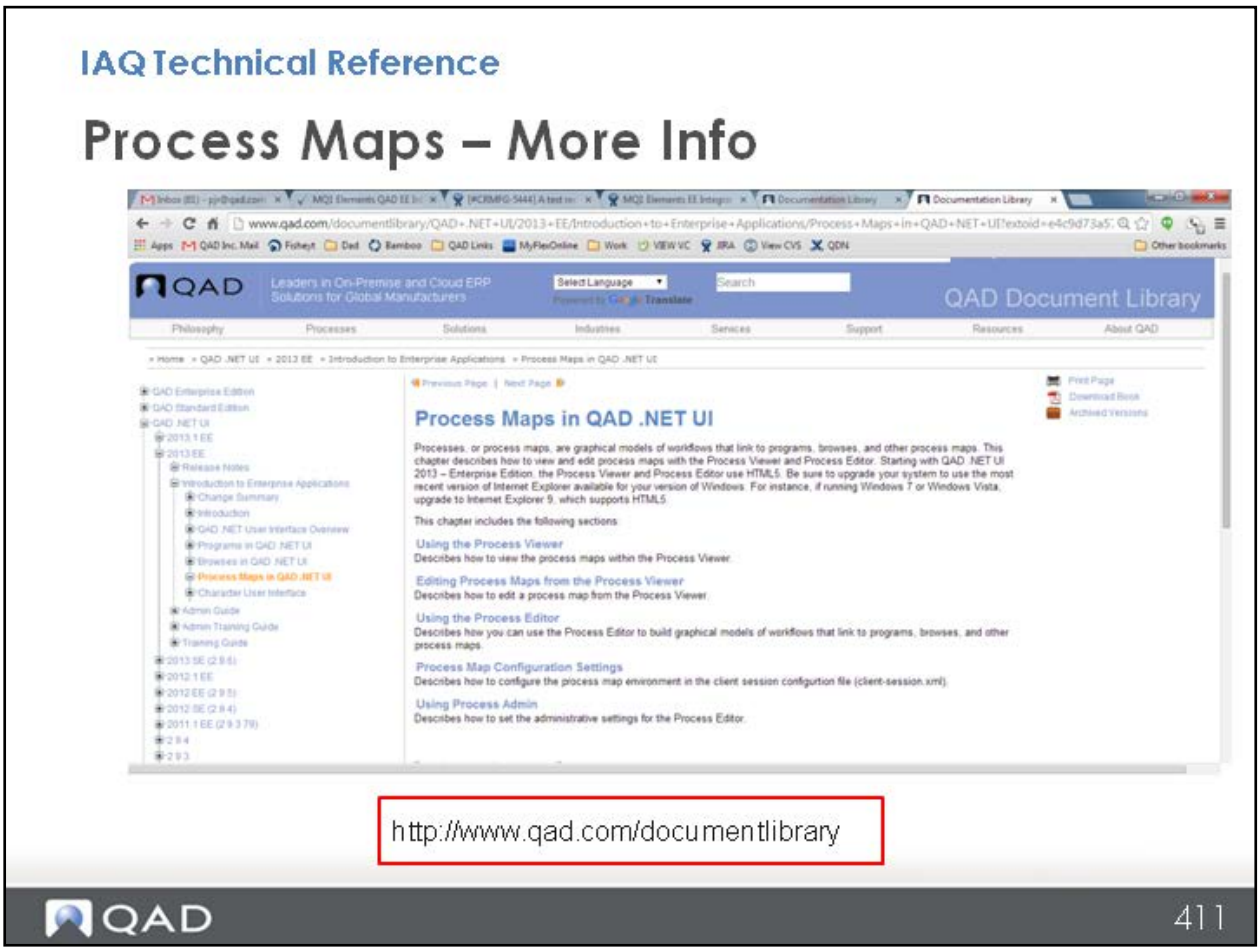
Process Maps – Existing Quality



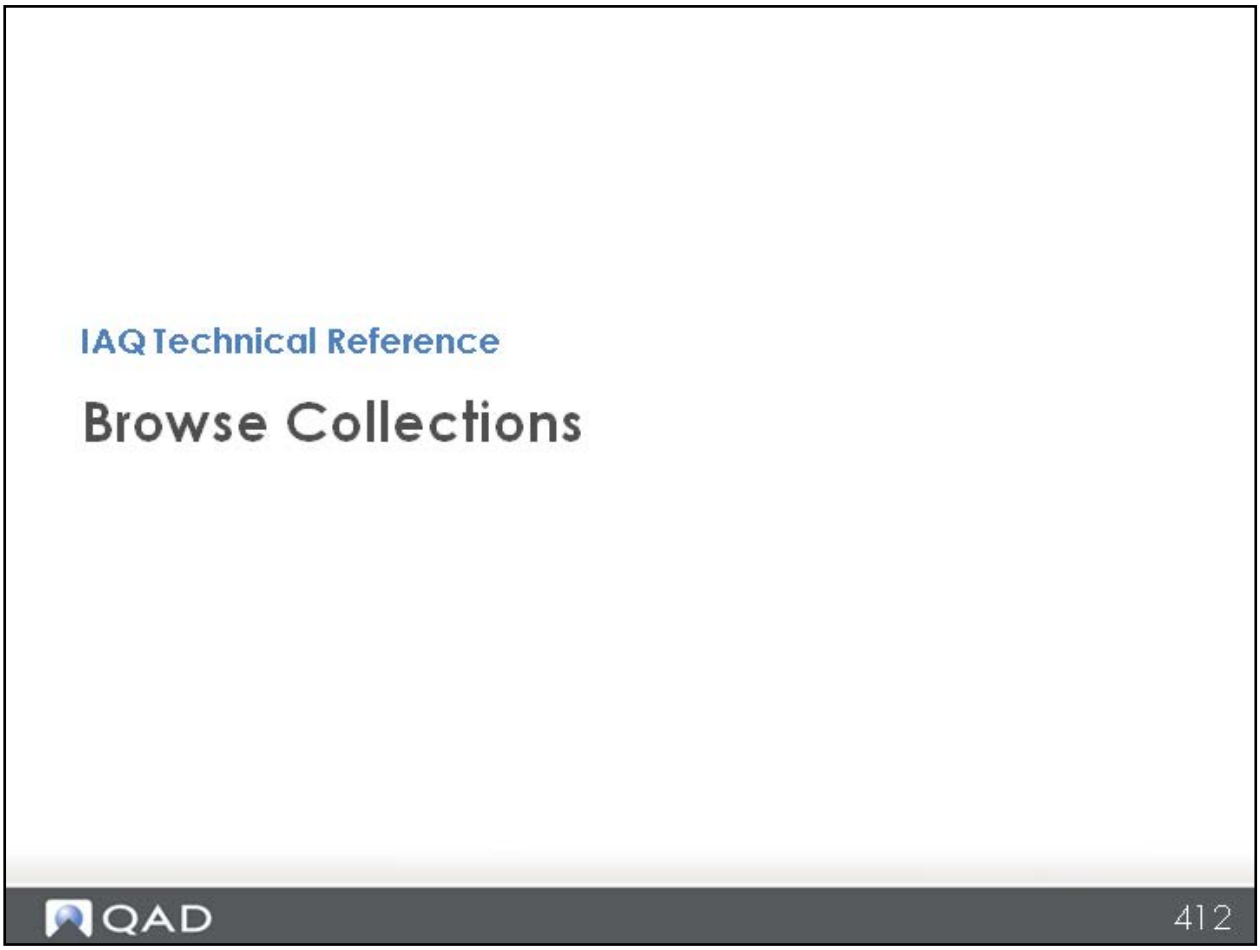
Process Maps



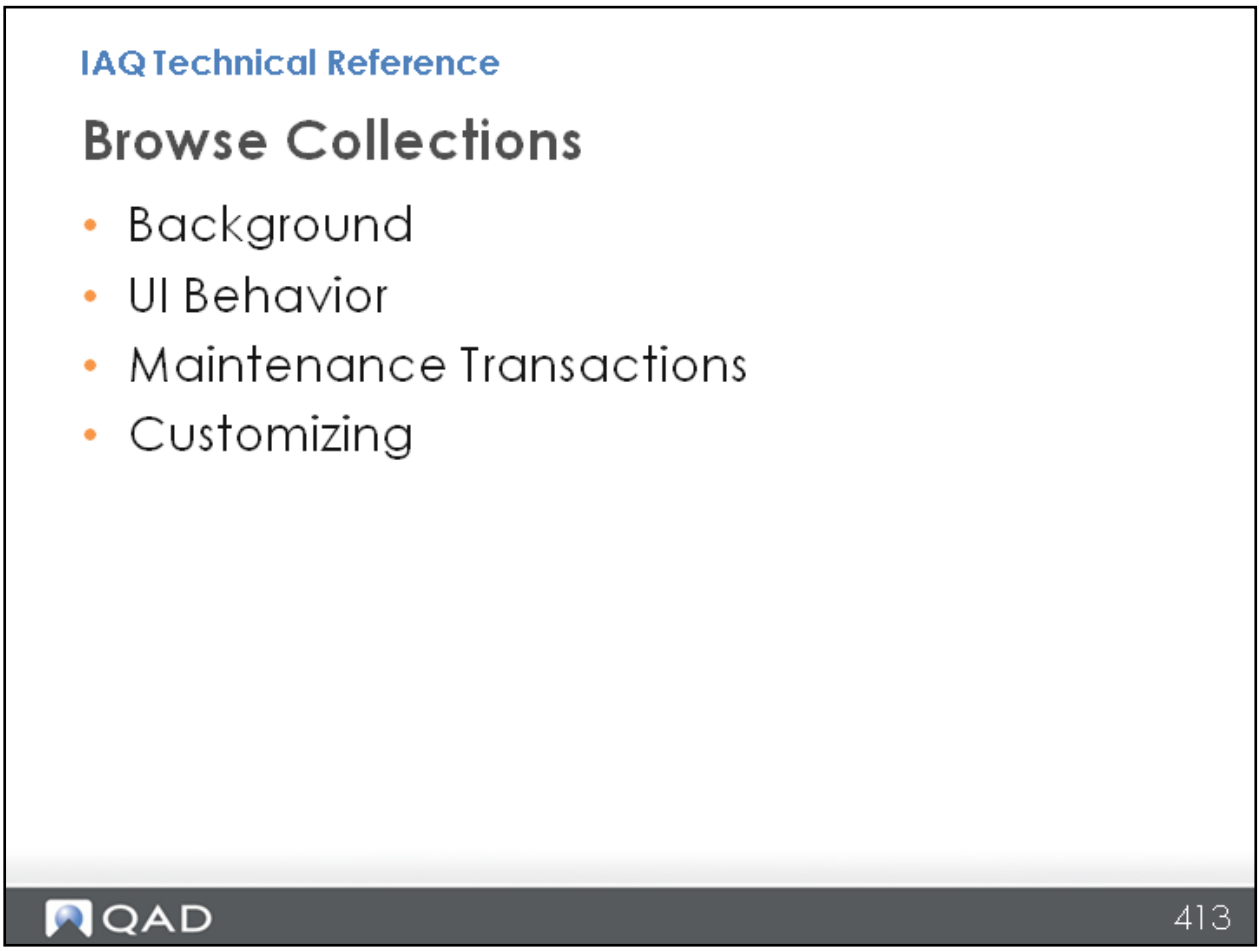
Process Maps – More Info



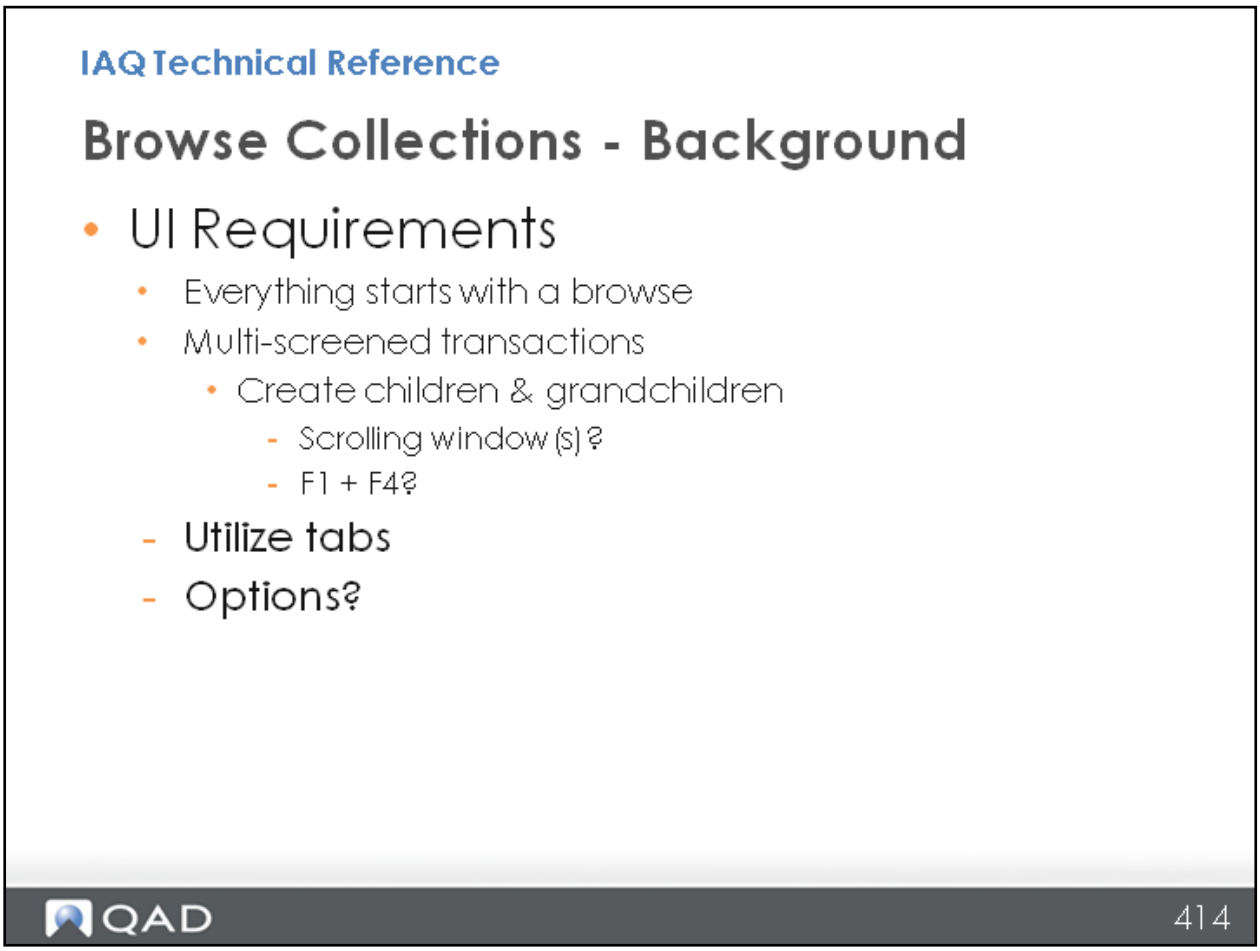
Browse Collections



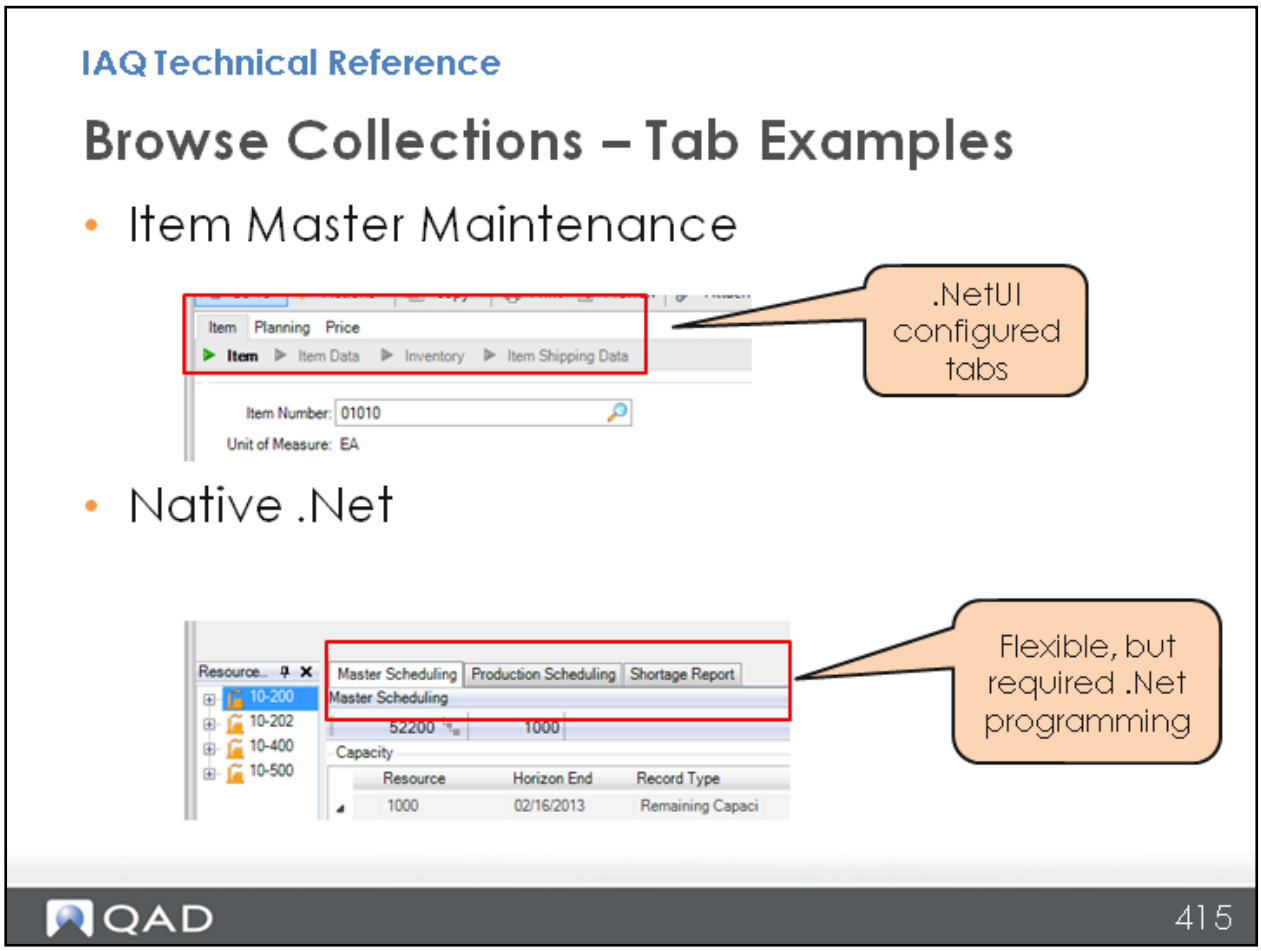
Browse Collections



Browse Collections - Background



Browse Collections – Tab Examples

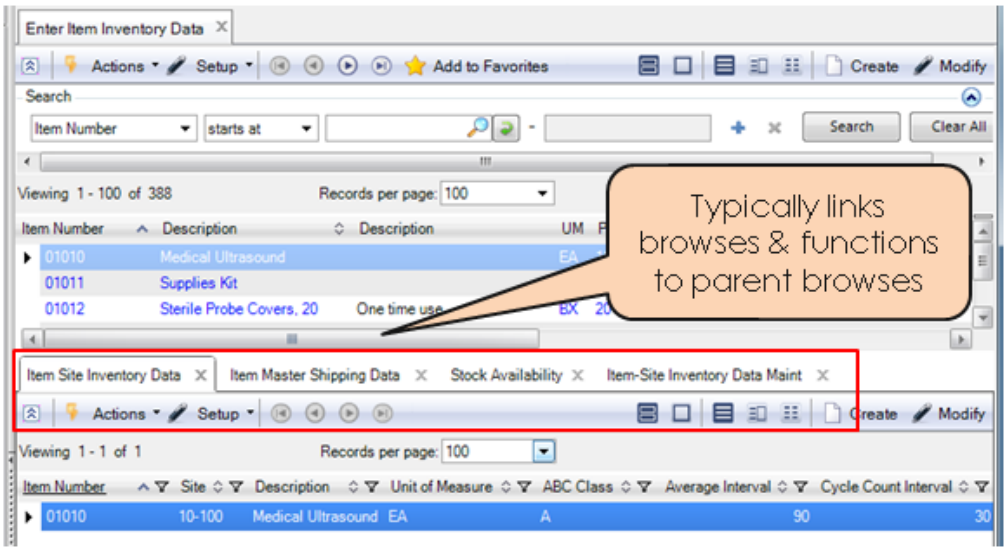


Browse Collections – Tab Examples

IAQ Technical Reference

Browse Collections – Tab Examples

- Browse Collection



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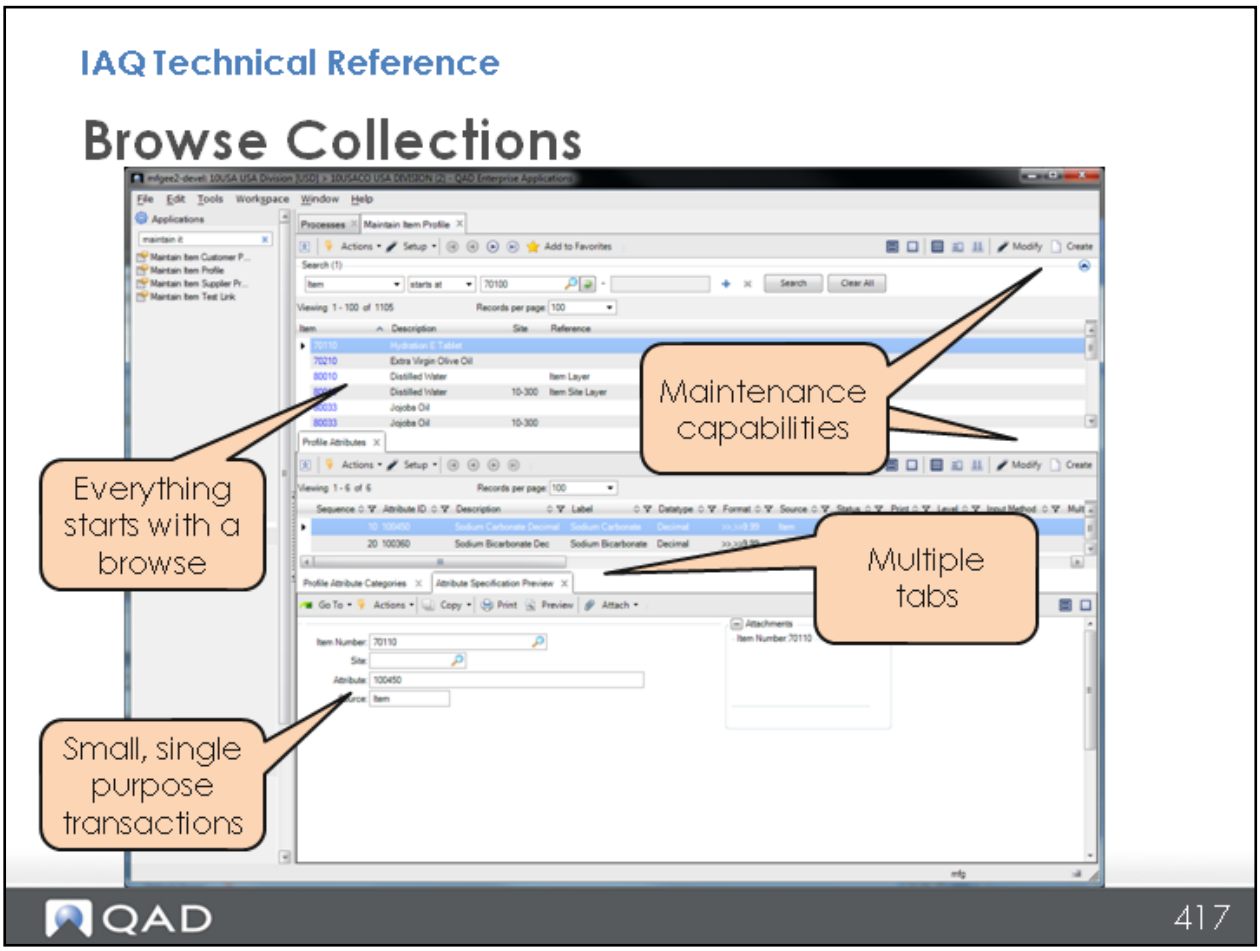
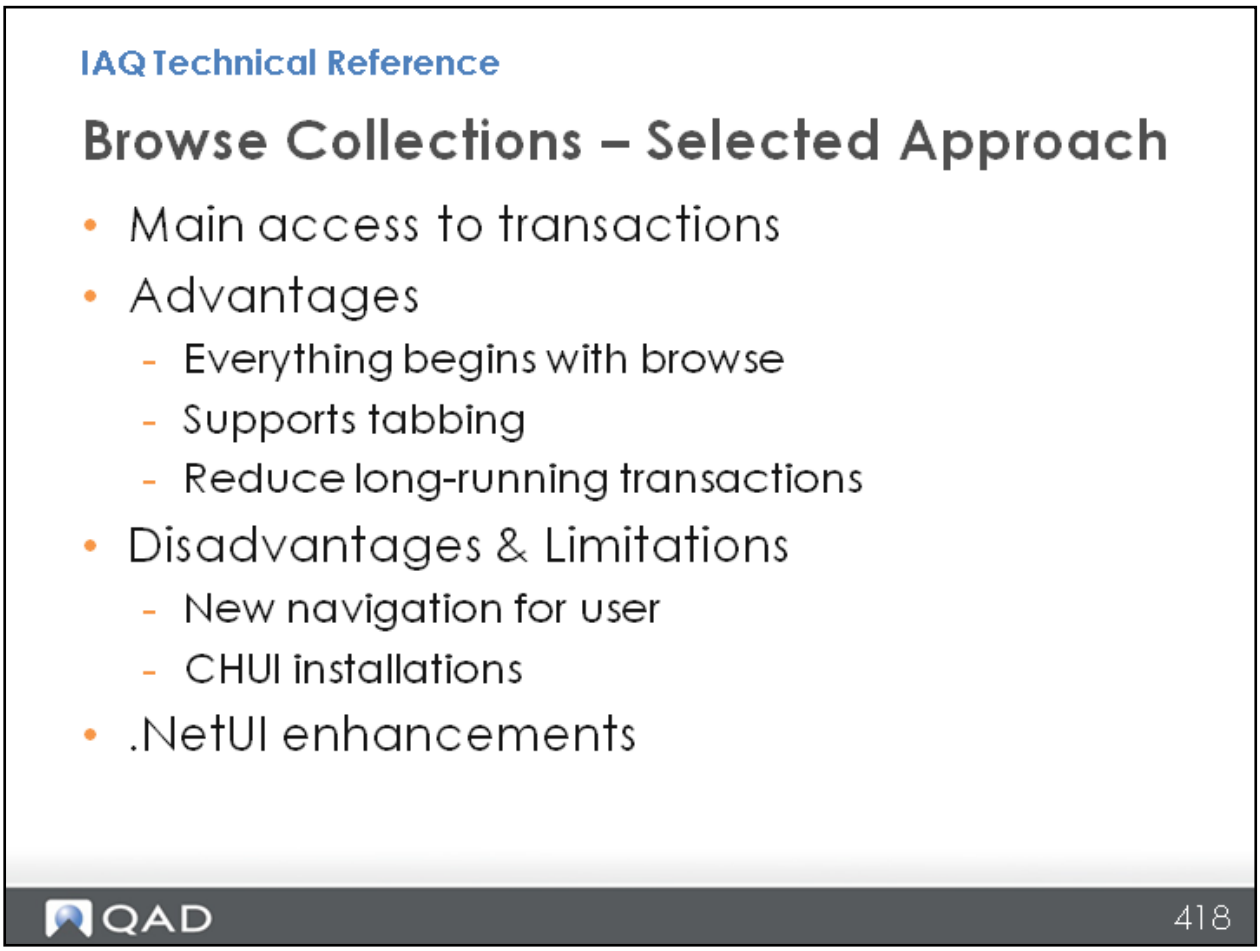
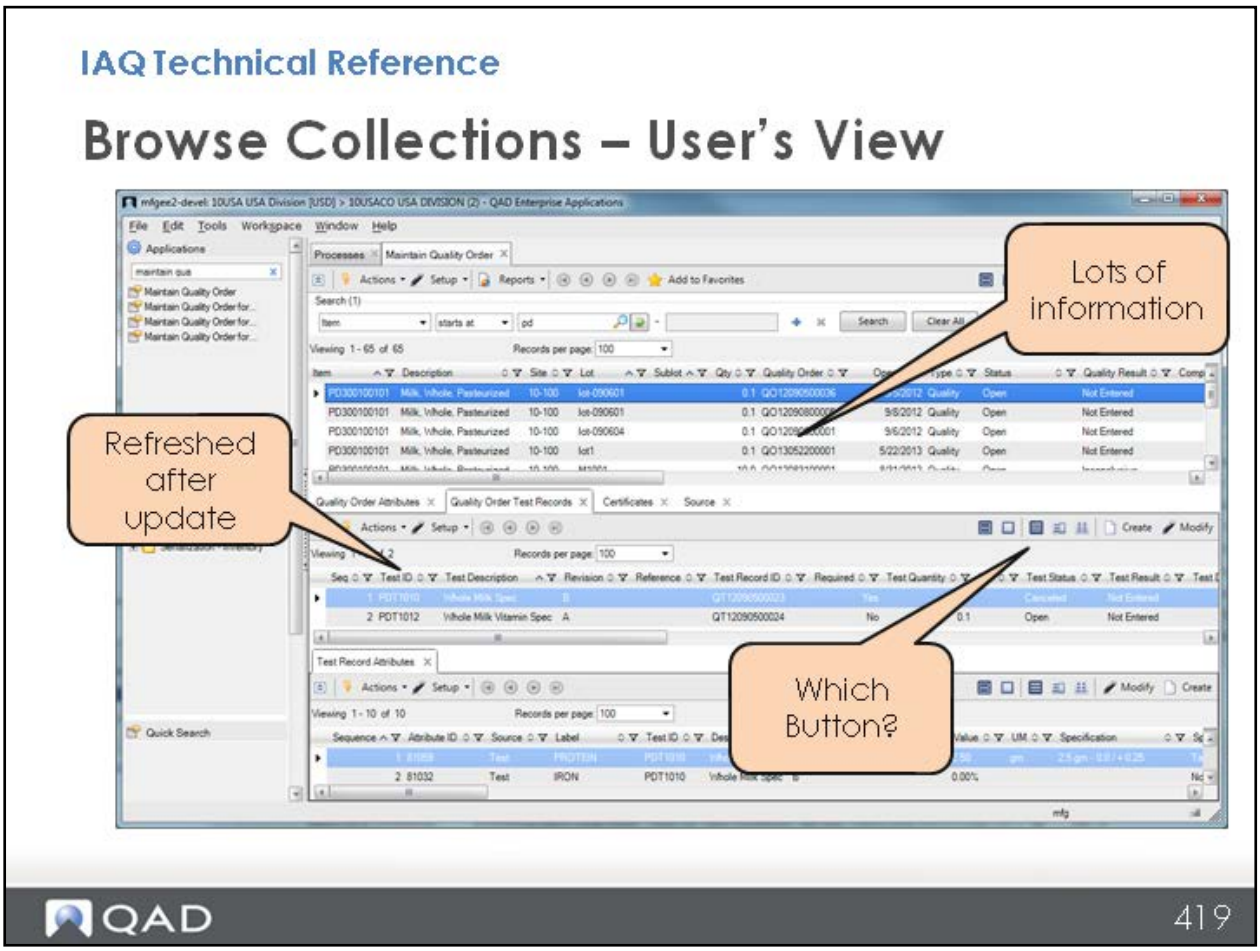
Browse Collections



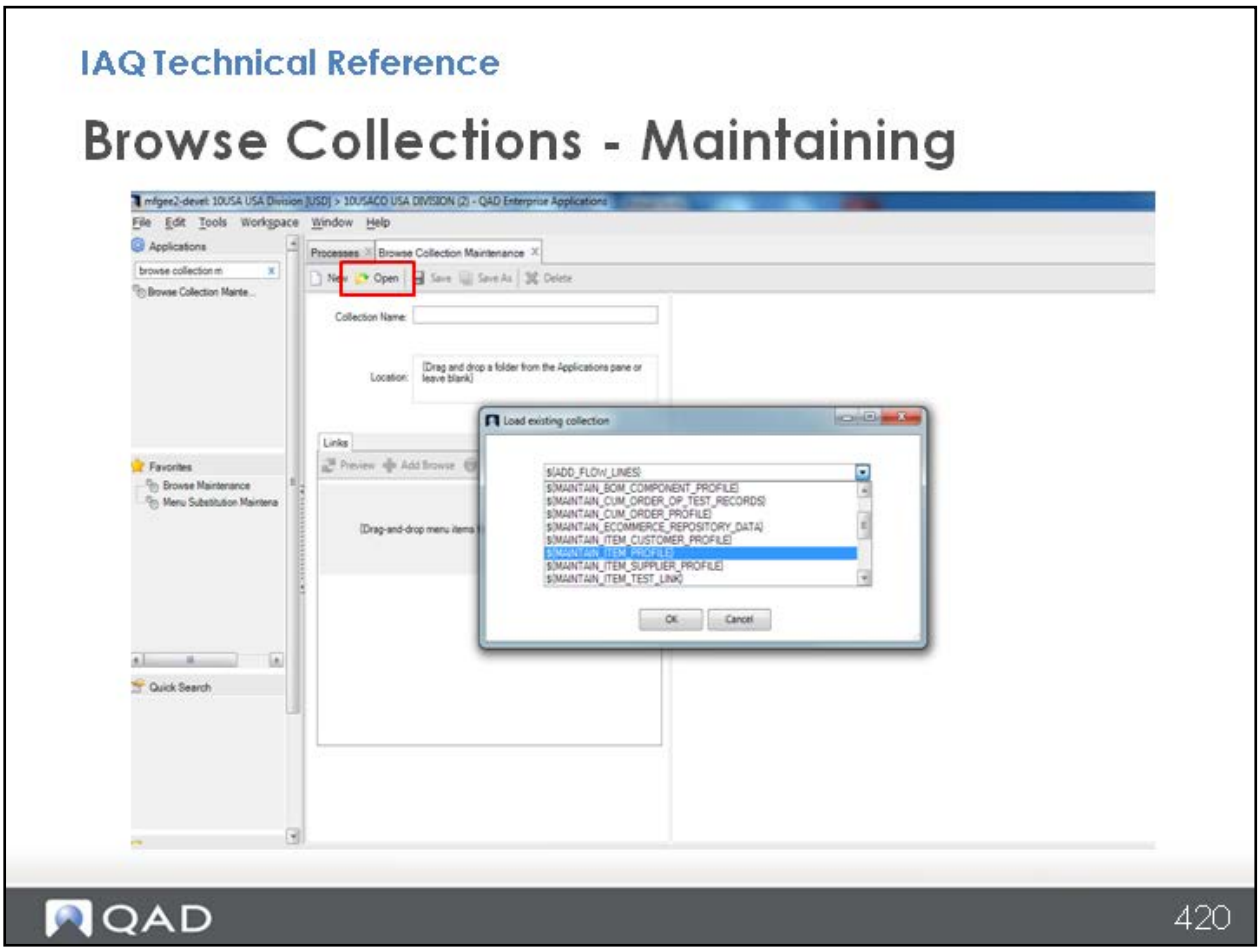
Browse Collections – Selected Approach



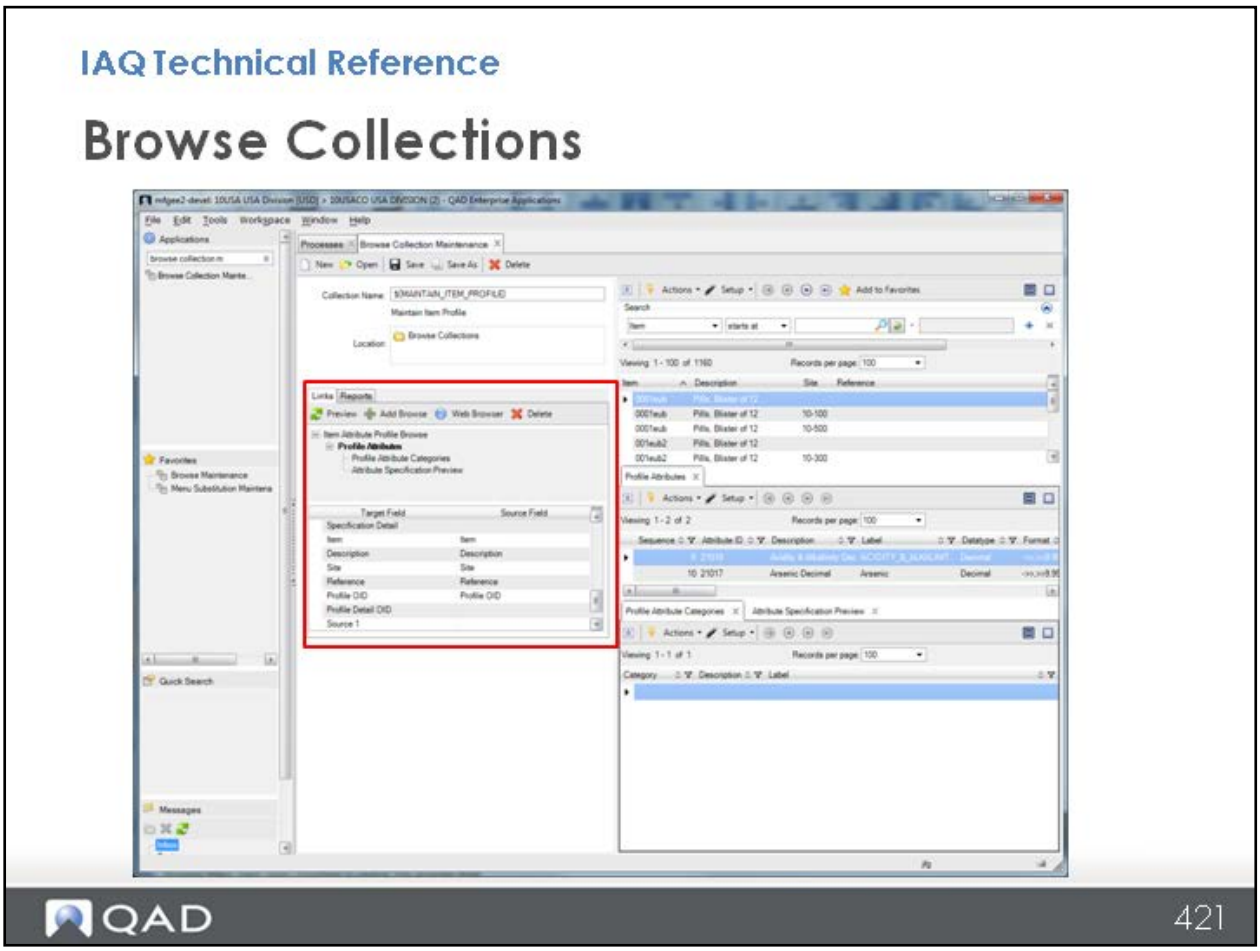
Browse Collections – User's View



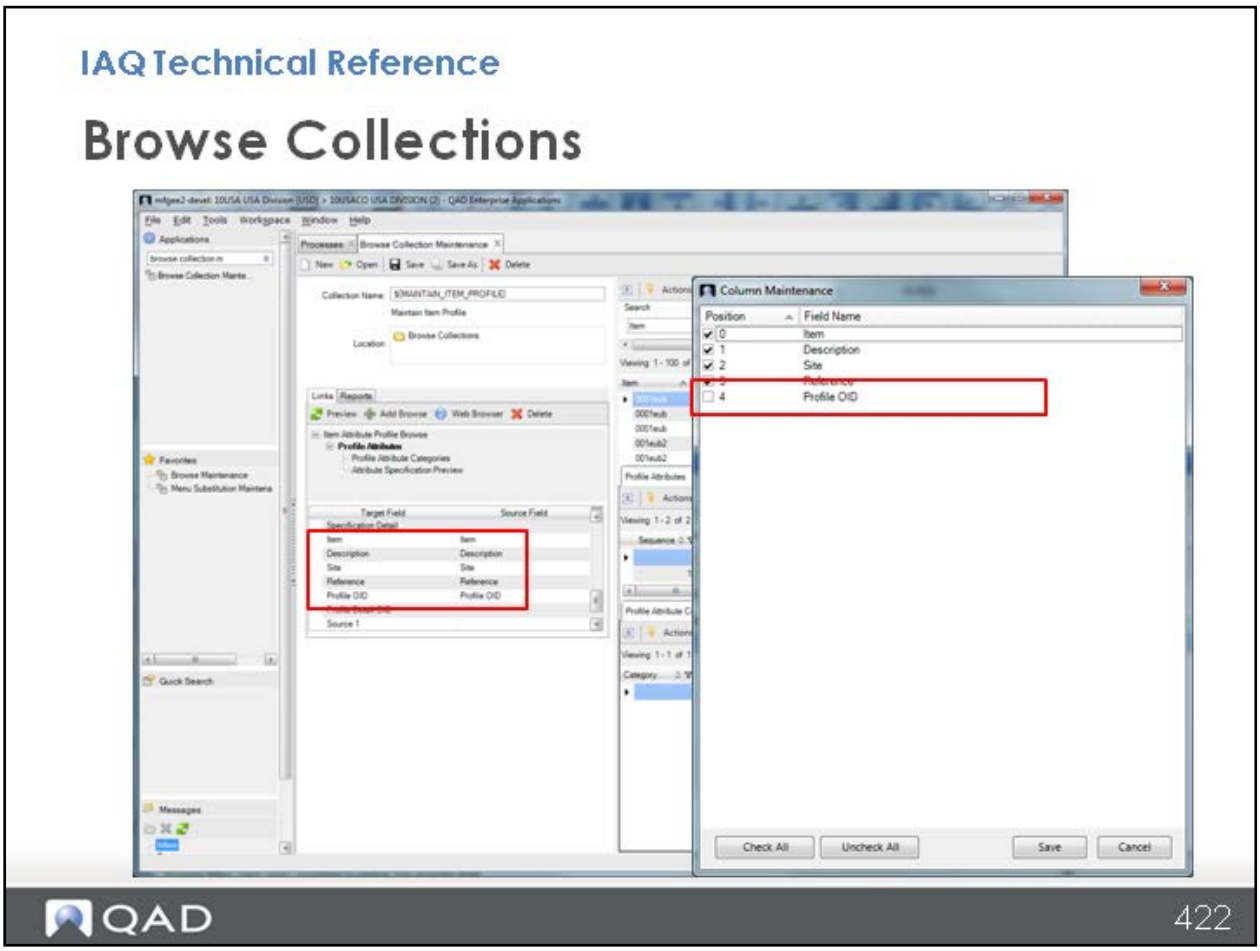
Browse Collections - Maintaining



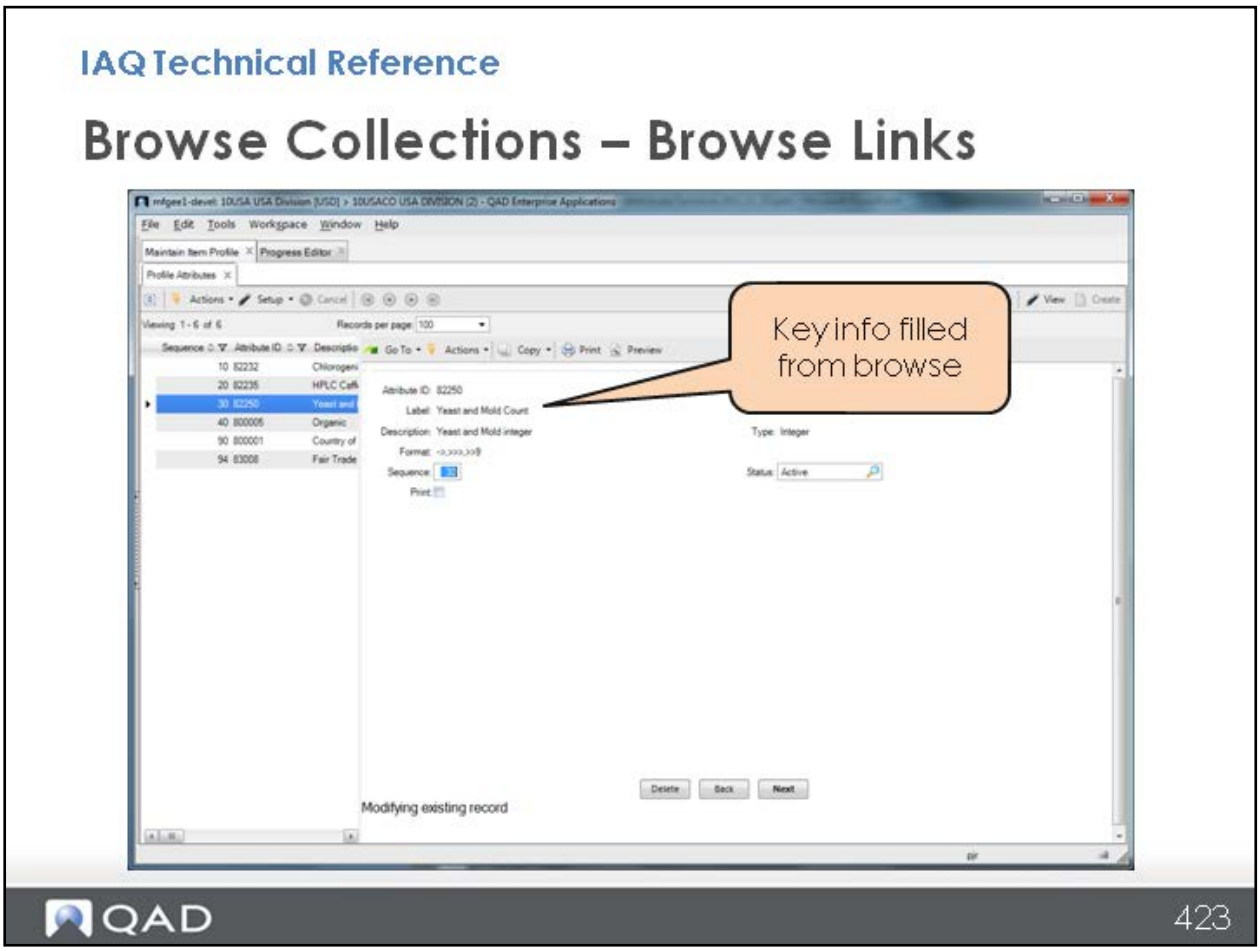
Browse Collections



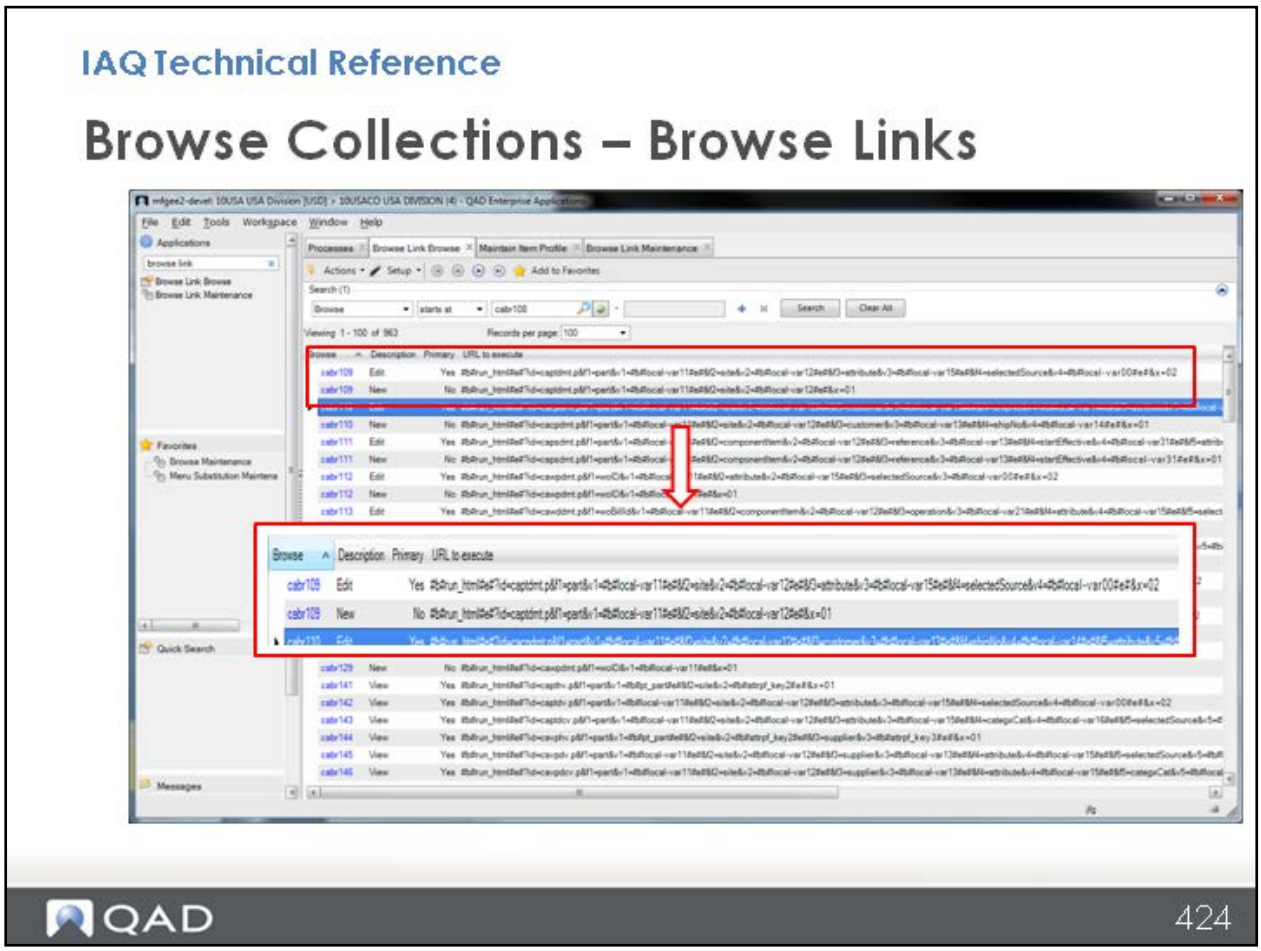
Browse Collections



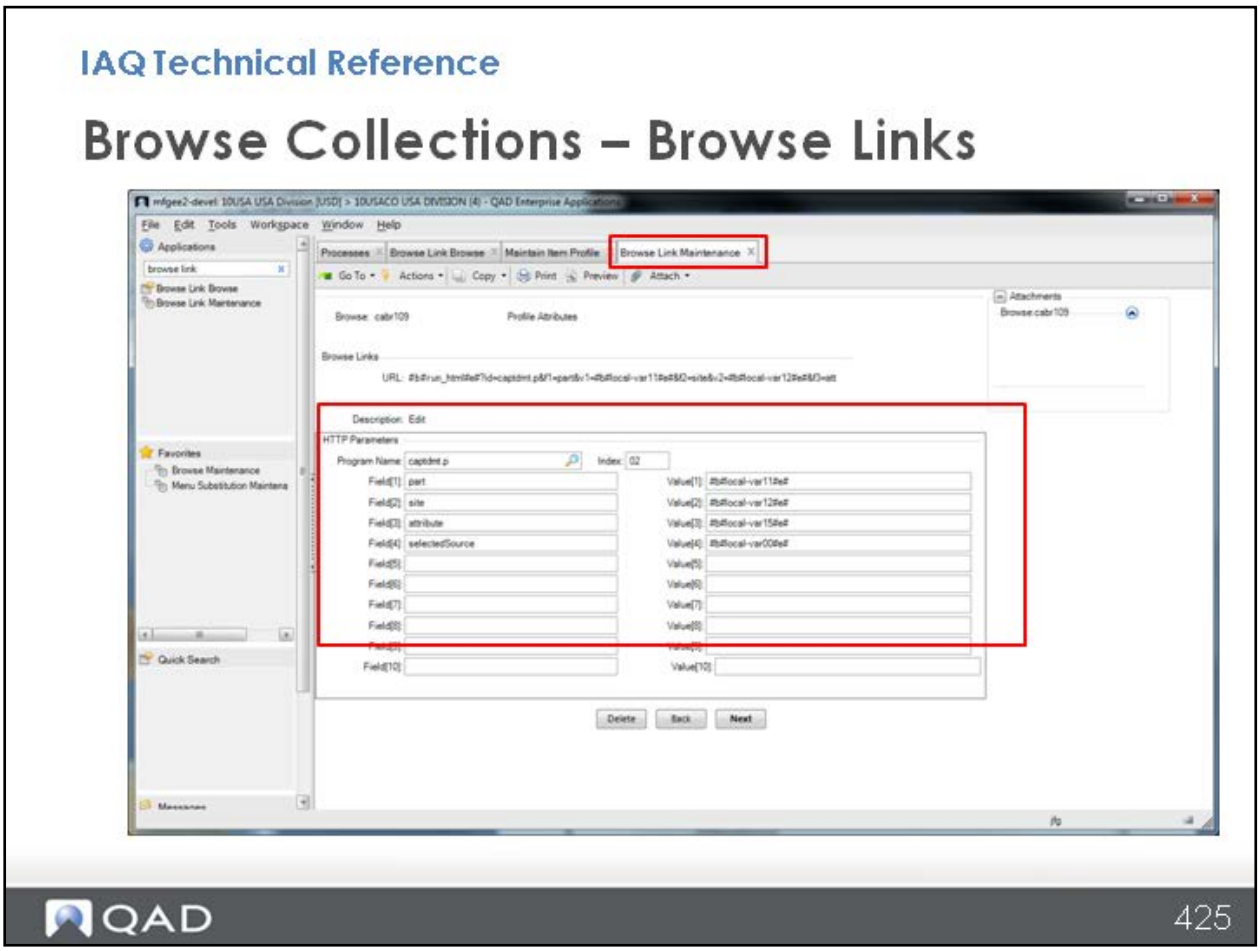
Browse Collections – Browse Links



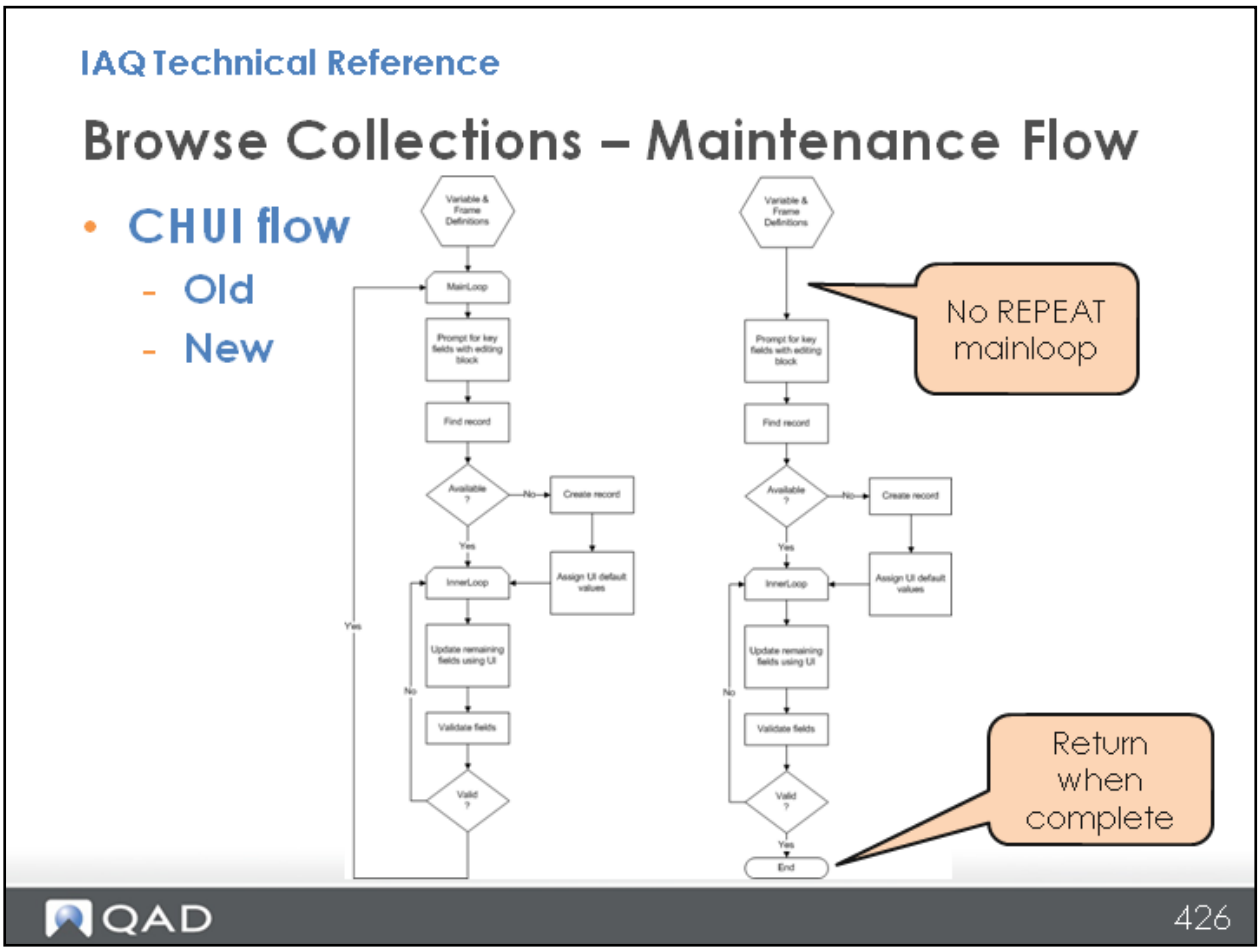
Browse Collections – Browse Links



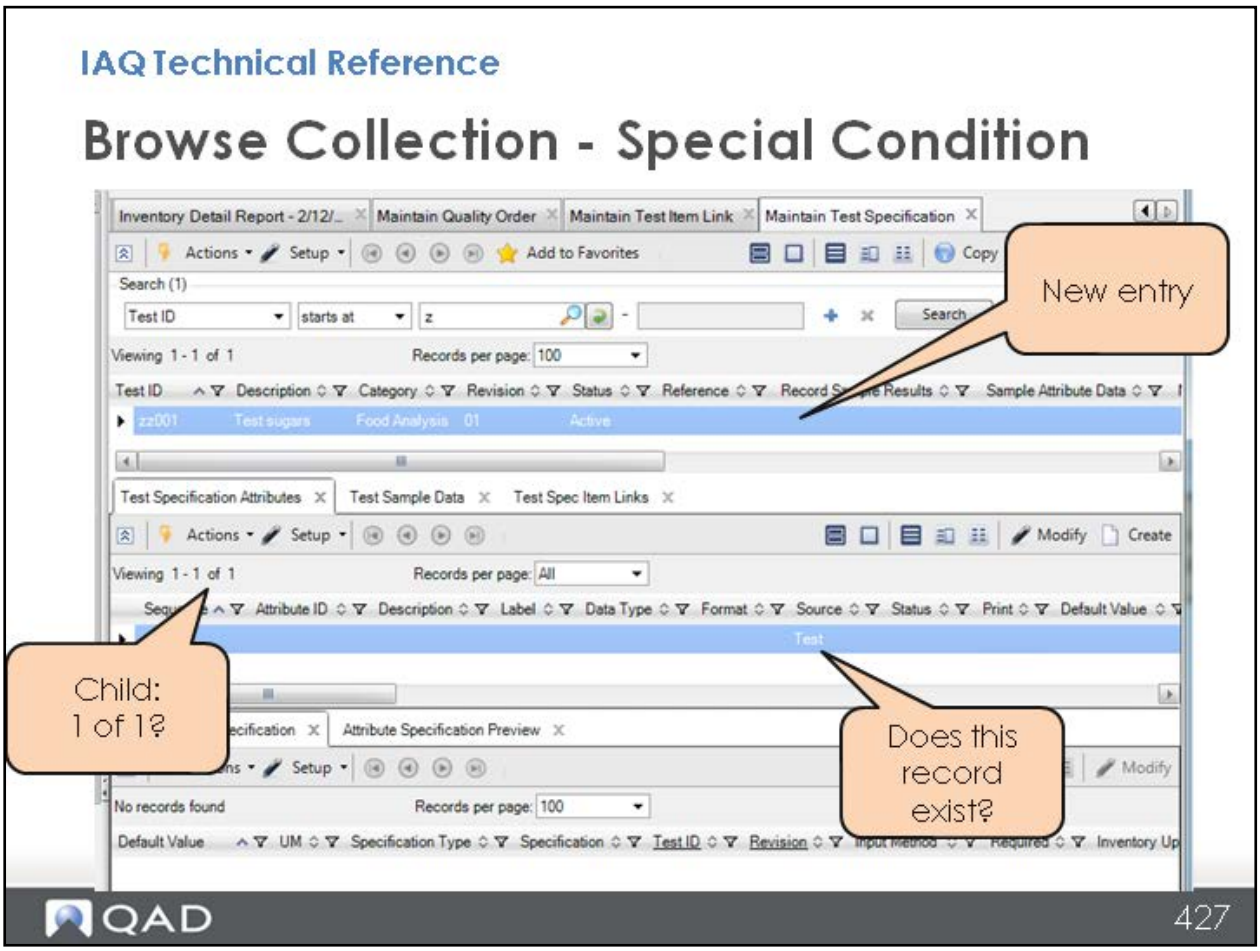
Browse Collections – Browse Links



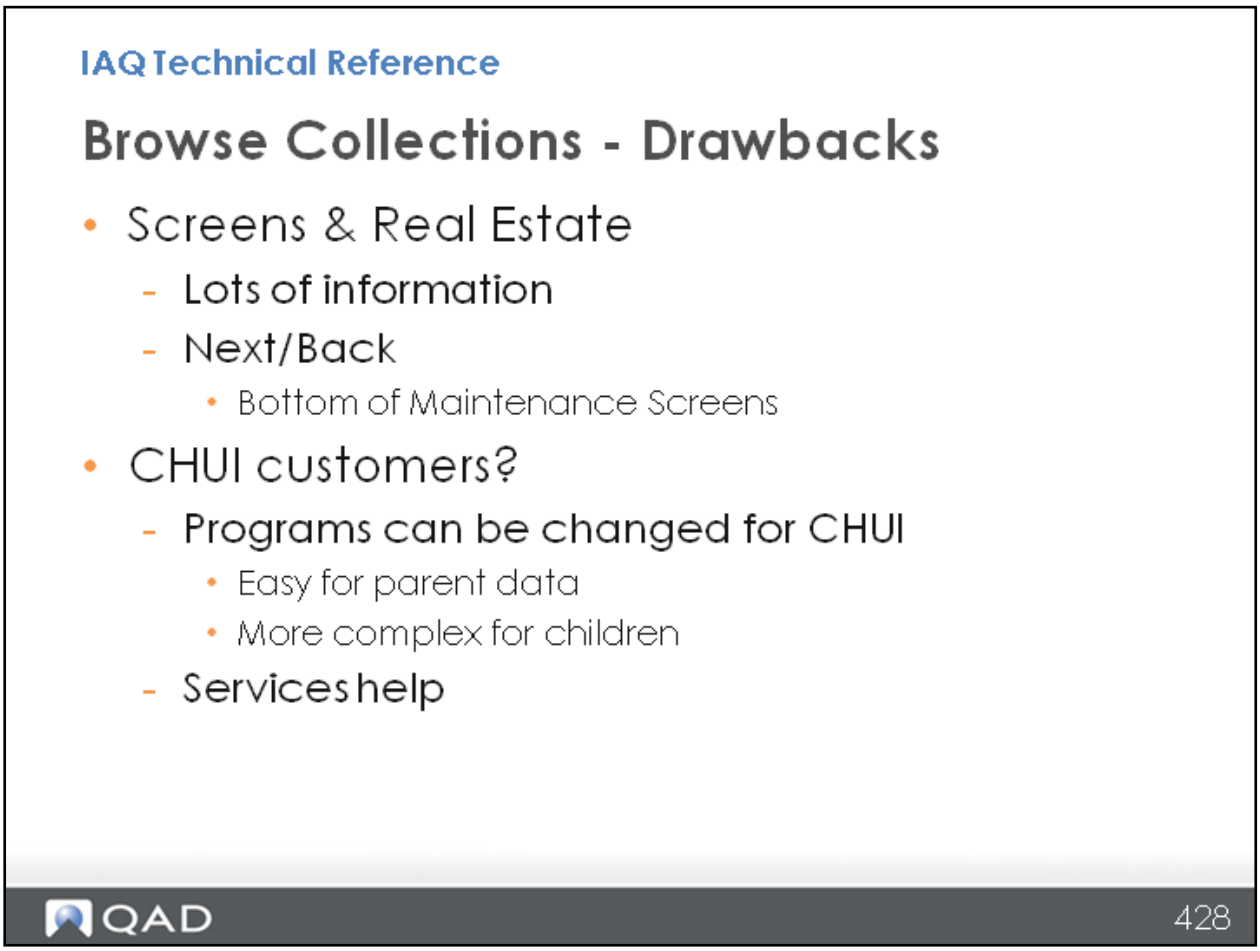
Browse Collections – Maintenance Flow



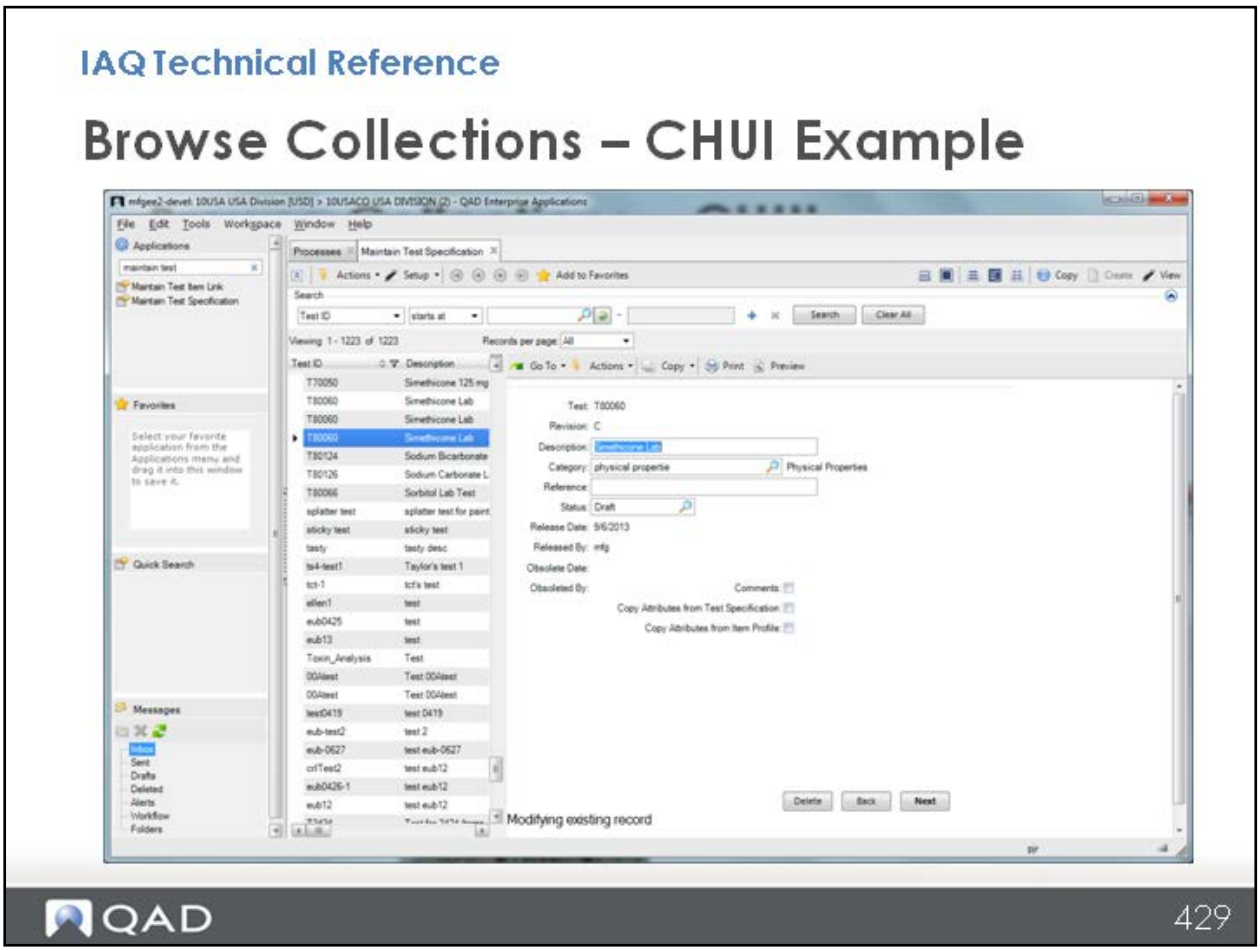
Browse Collection - Special Condition



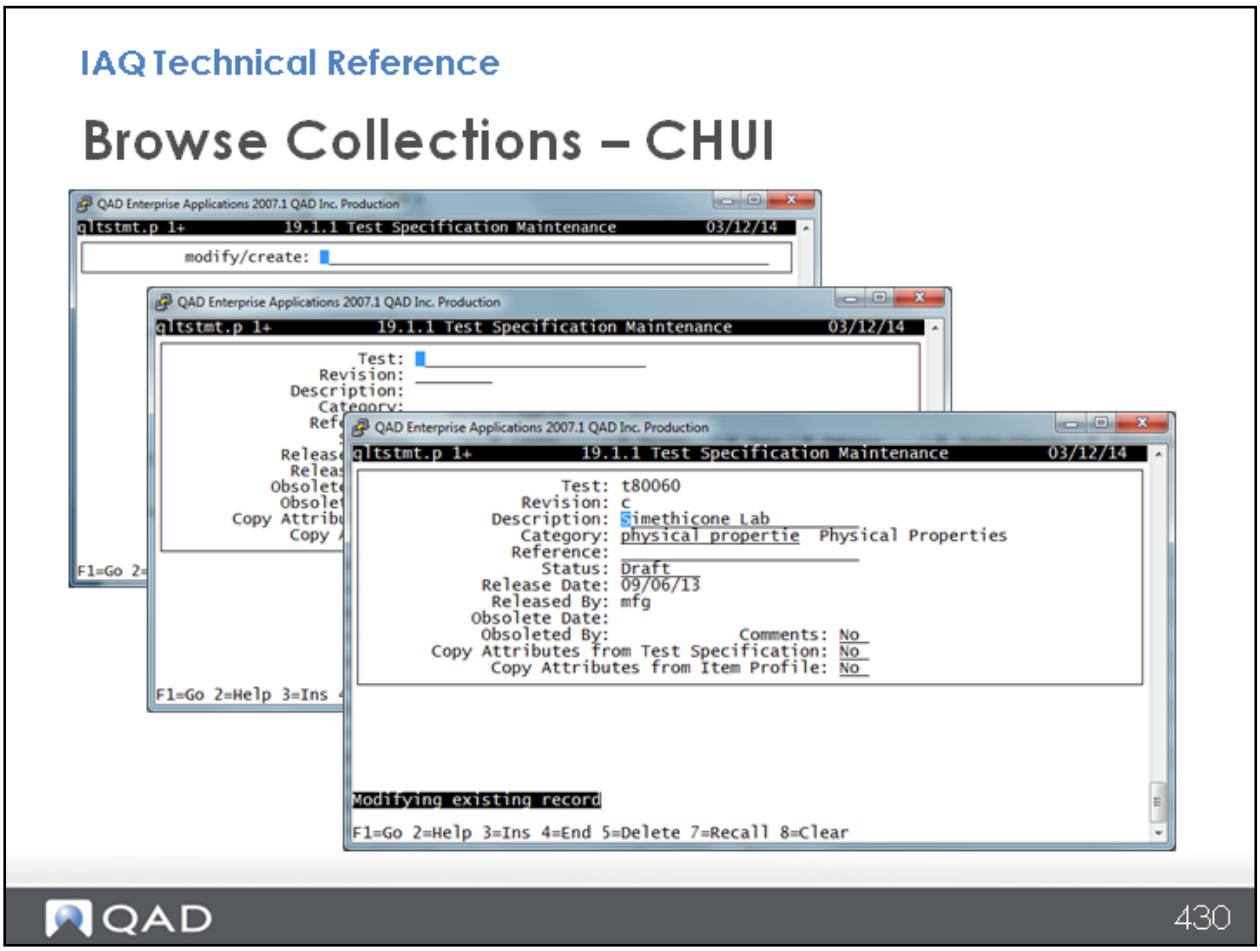
Browse Collections - Drawbacks



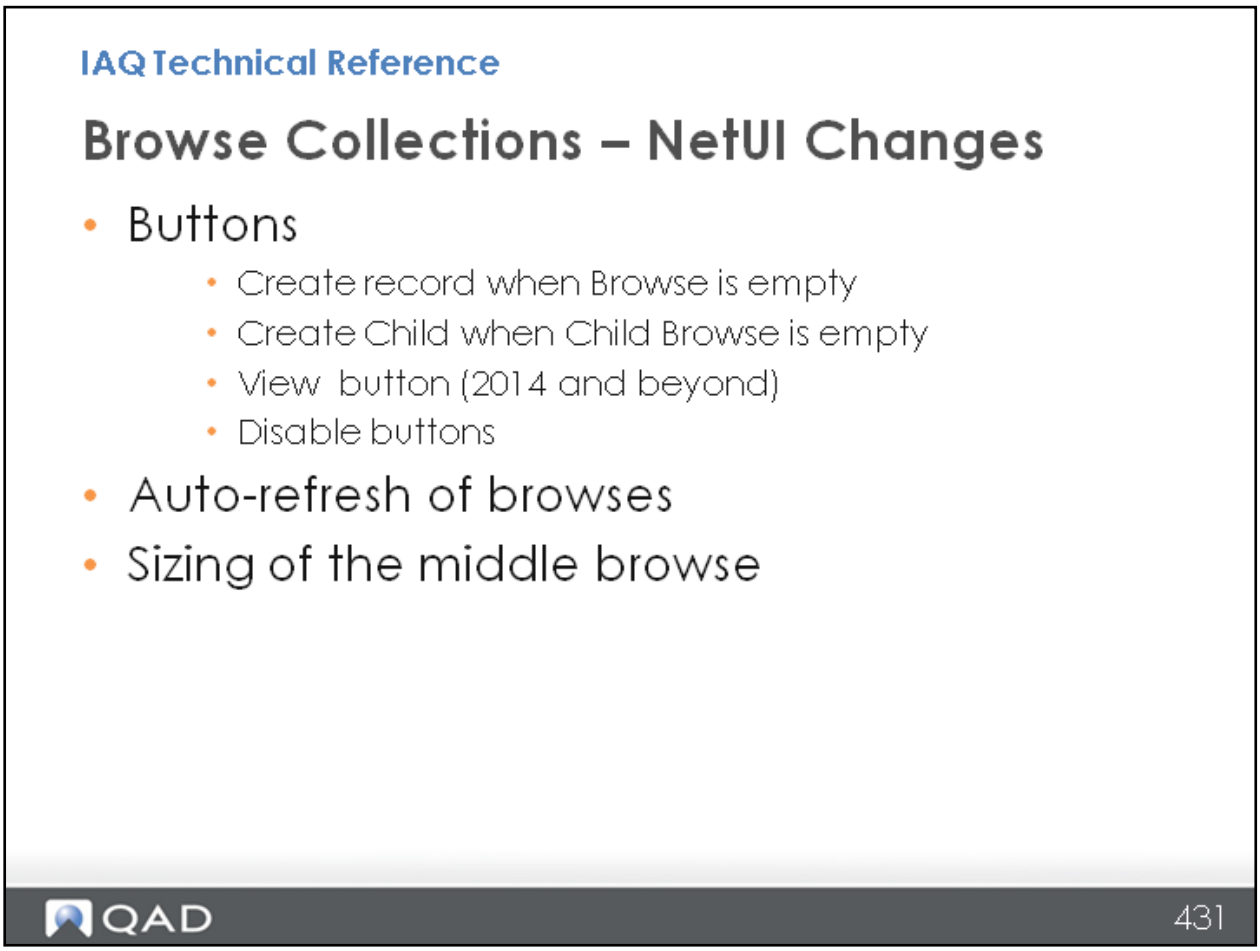
Browse Collections – CHUI Example



Browse Collections – CHUI



Browse Collections – NetUI Changes

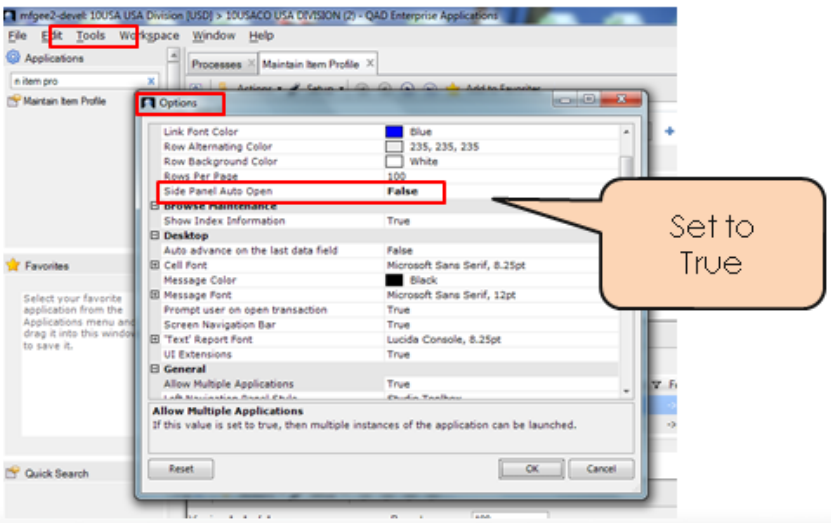


Browse Collections - TroubleShooting

IAQ Technical Reference

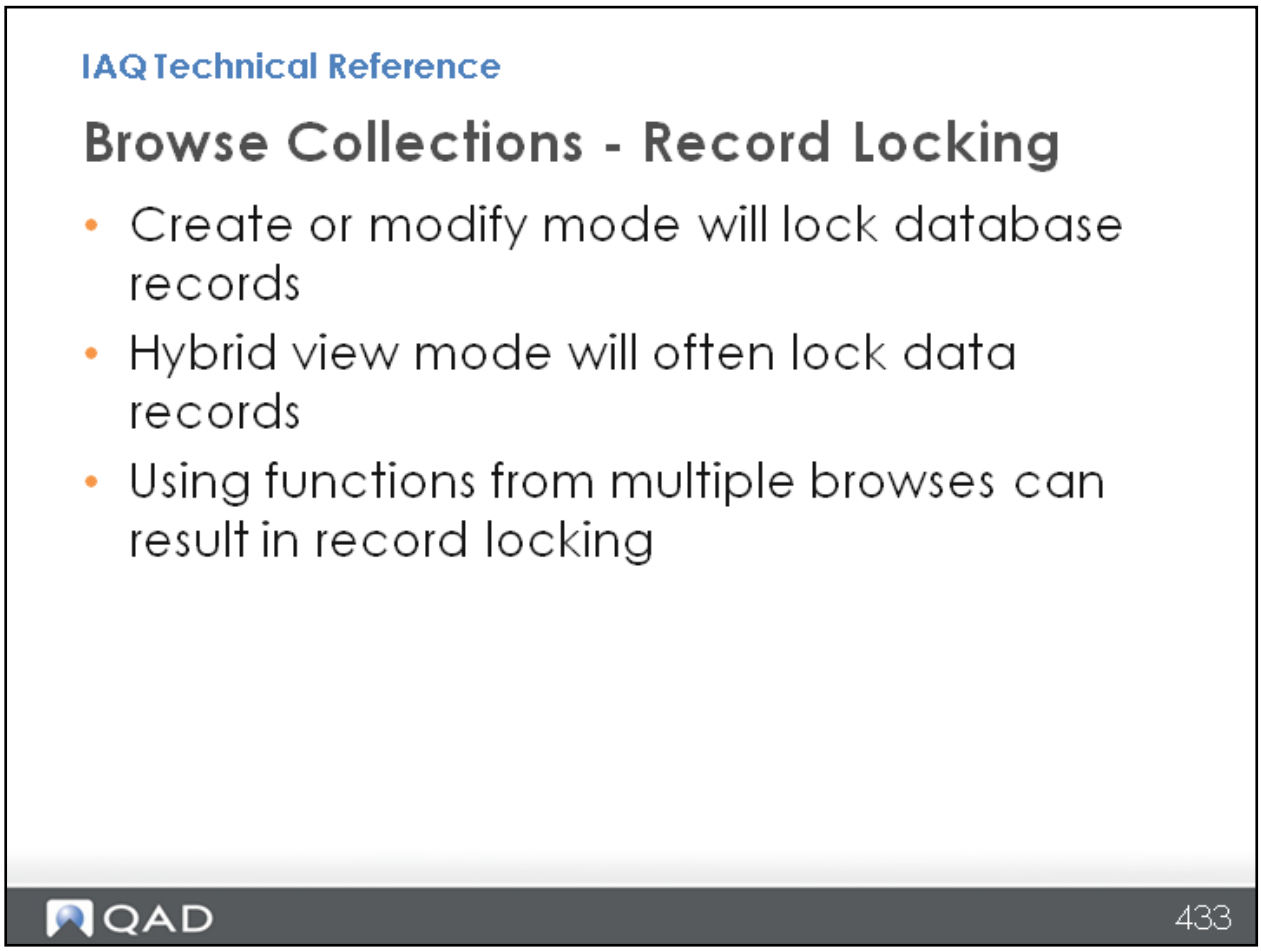
Browse Collections - TroubleShooting

- Browse doesn't refresh
- Transactions Open in New Window



QAD 432

Browse Collections - Record Locking

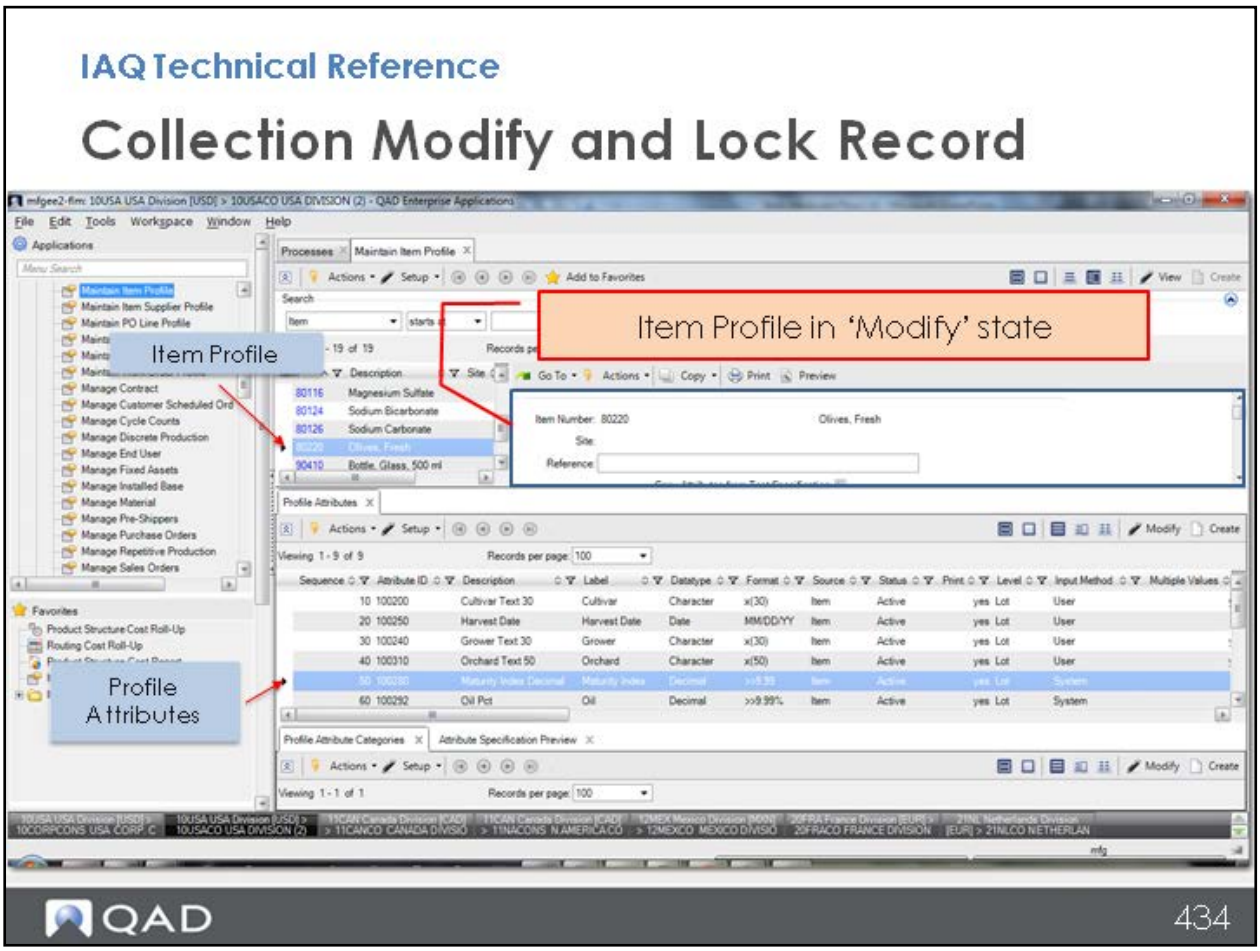


One of the most common problems that users encounter when first using browse collections is record locking, where the locked record is locked by the user by her or himself.

Locked records prevent users from accessing or editing certain records. This happens because the records are in use by the system.

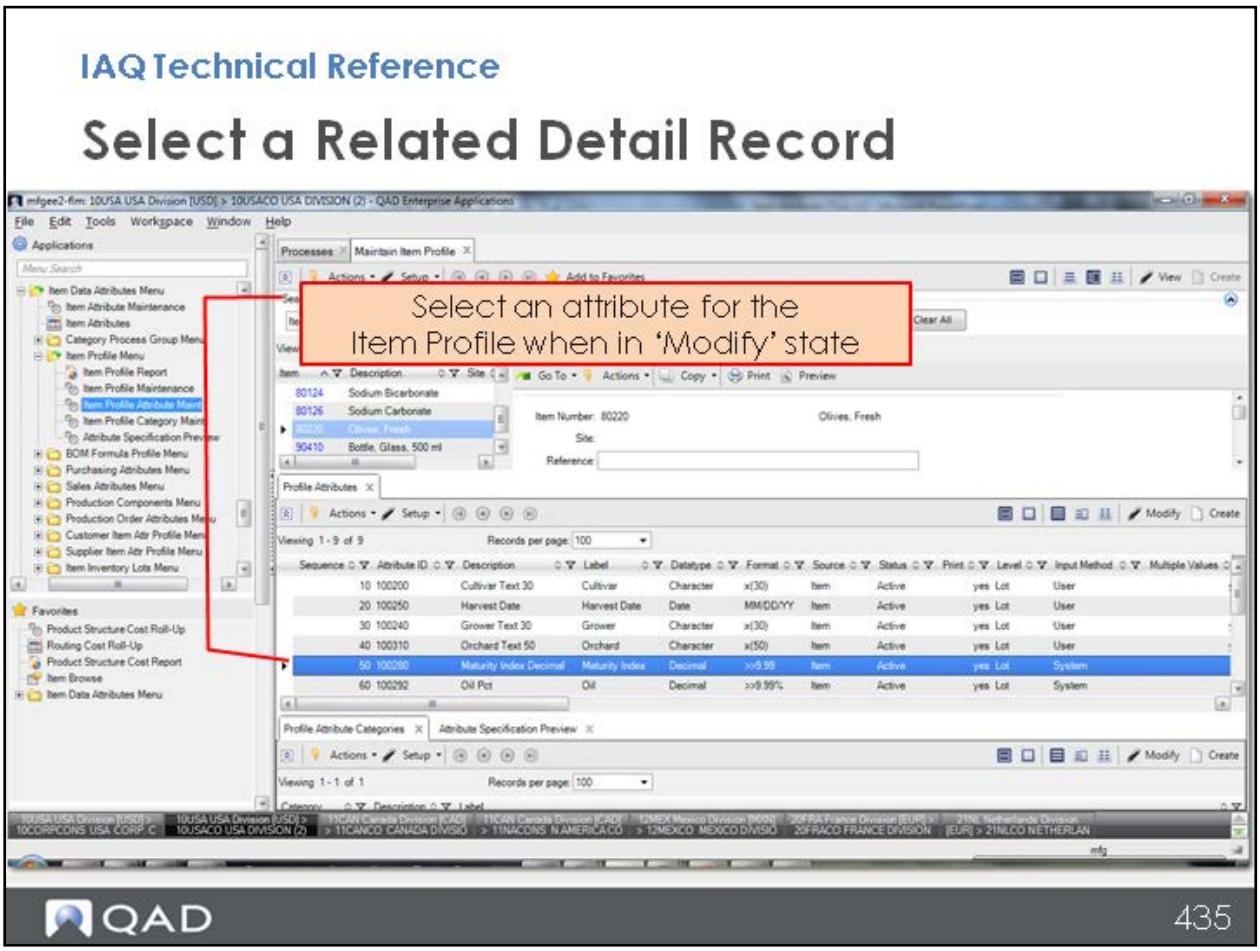
There are two common causes of record locking. The first is entering create or modify mode with a record. The second is to access different browses within the same collection.

Collection Modify and Lock Record



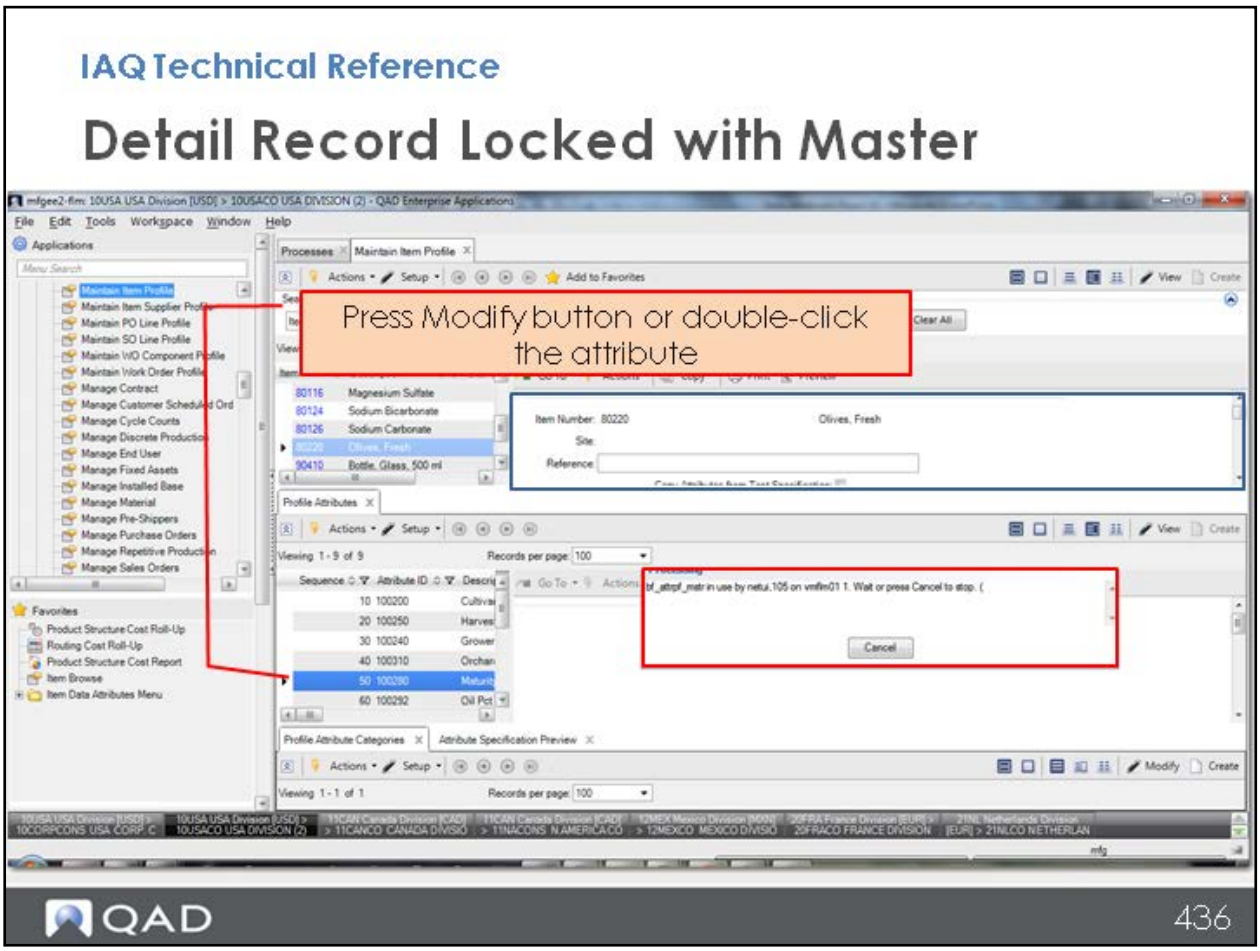
When you create or modify a record, that record enters the modify state. While in the modify state, a record is locked. Accessing it elsewhere while result in an error.

Select a Related Detail Record



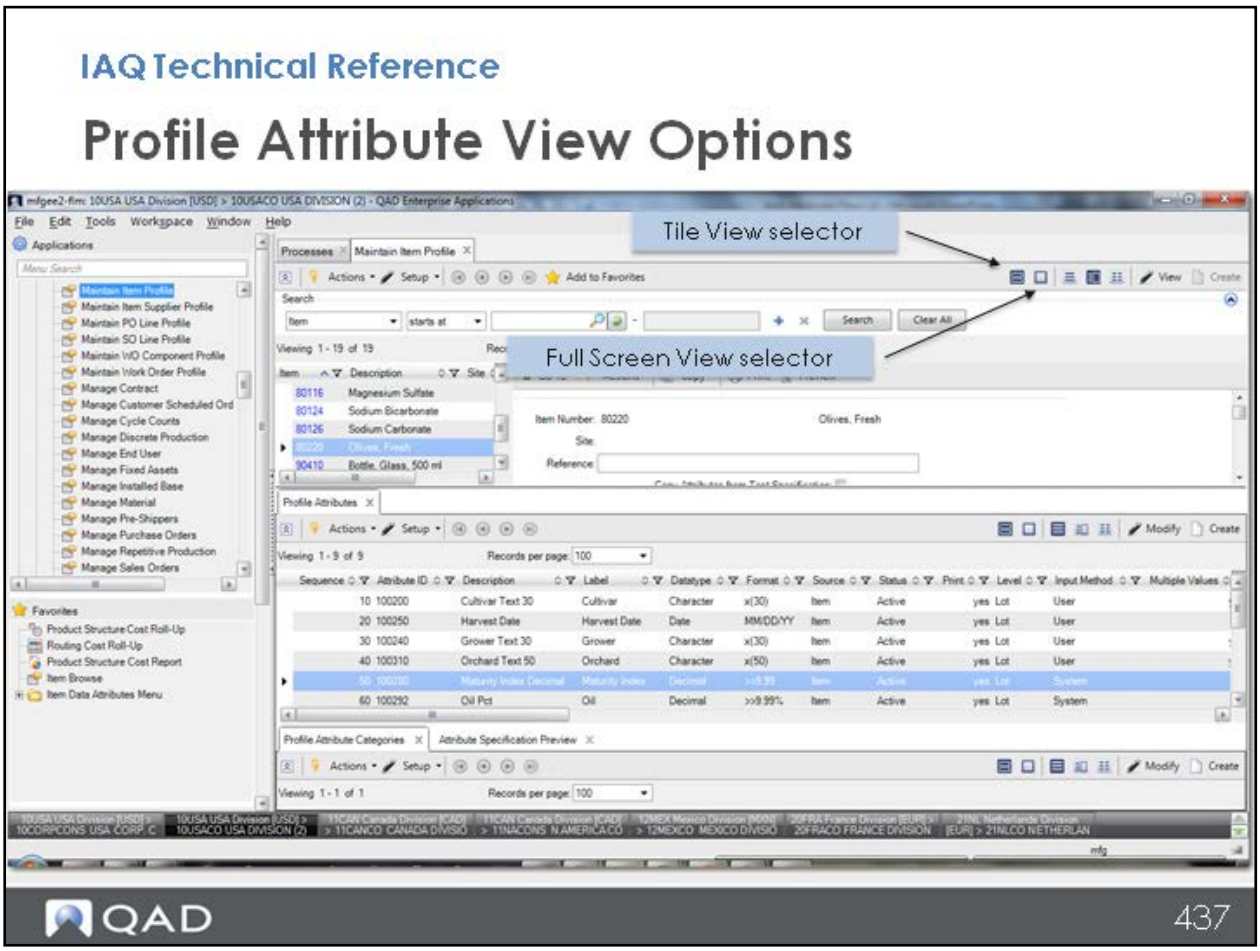
While a record is in the modify state, the records in more detailed levels of its browse collection are also locked.

Detail Record Locked with Master



Attempting to modify or create a record in a lower level browse of a locked attribute will result in an error.

Profile Attribute View Options

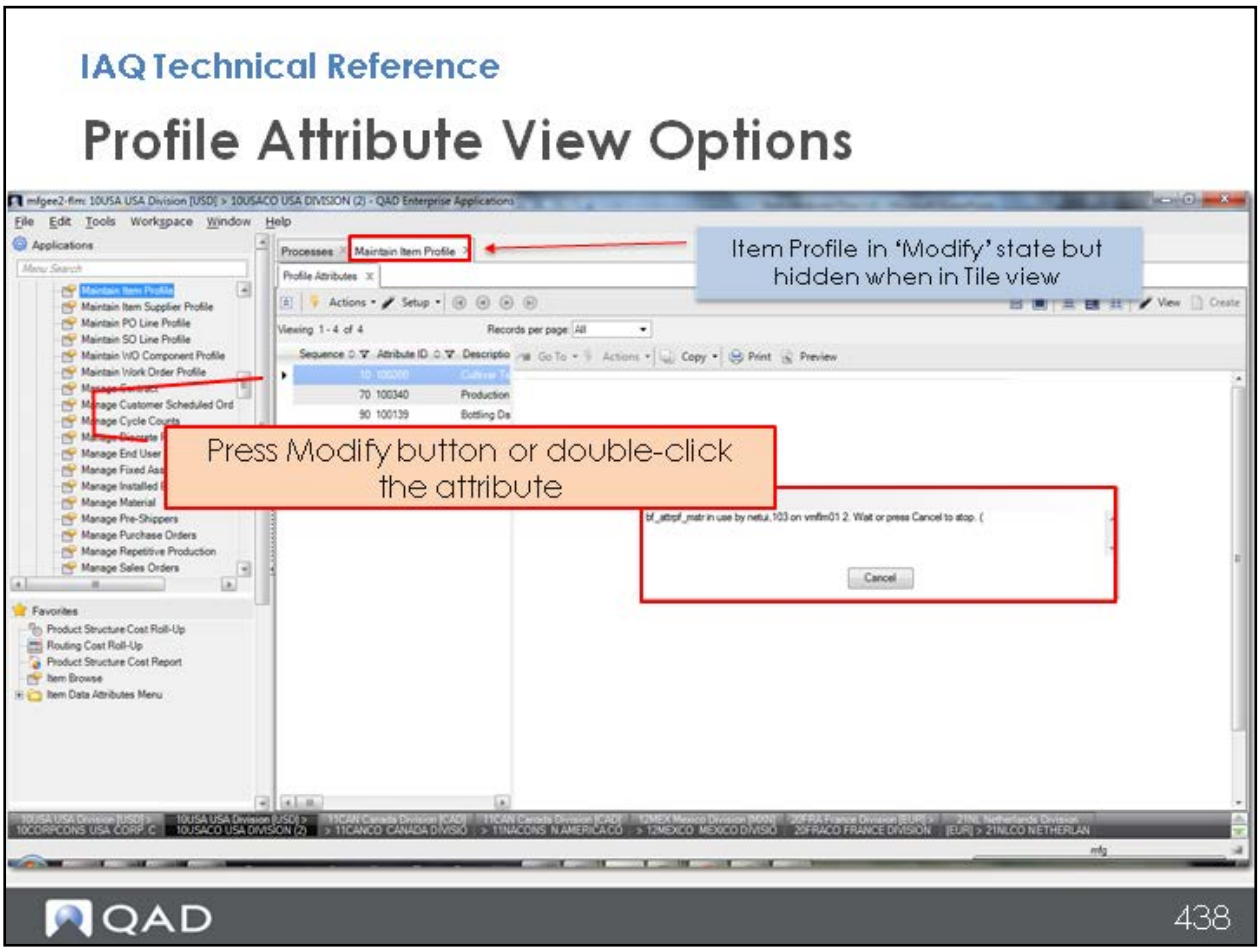


When using QAD EE, you have multiple options for viewing browses and browse collections.

The Tile View presents all levels of a browse collection, at once, tiled downward by hierarchy. This option provides the most complete view of the browse hierarchy.

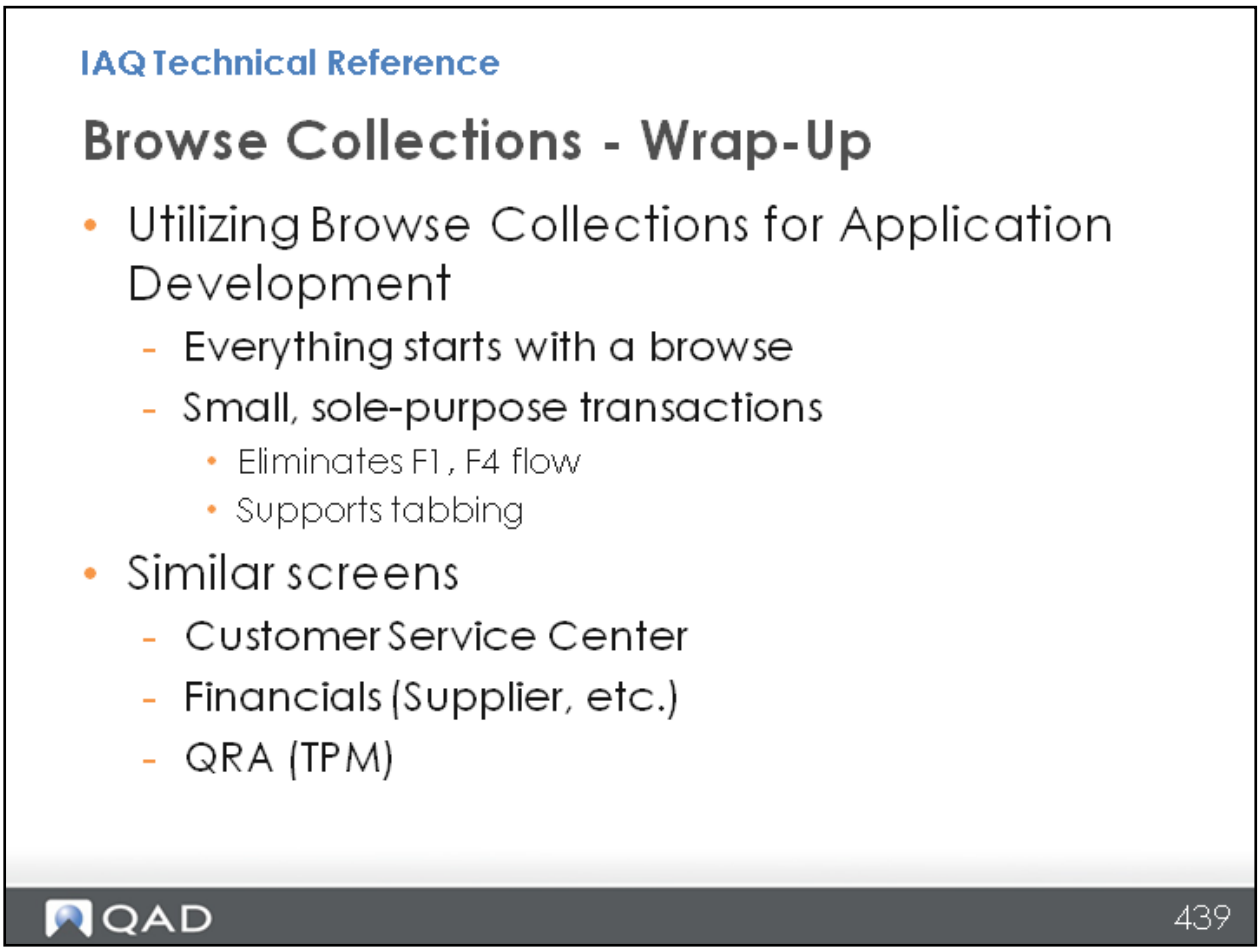
The Full Screen View expands the selected browse to fill the screen. This minimizes higher level browses and hides lower level browses. This option makes the browse significantly easier to use.

Profile Attribute View Options



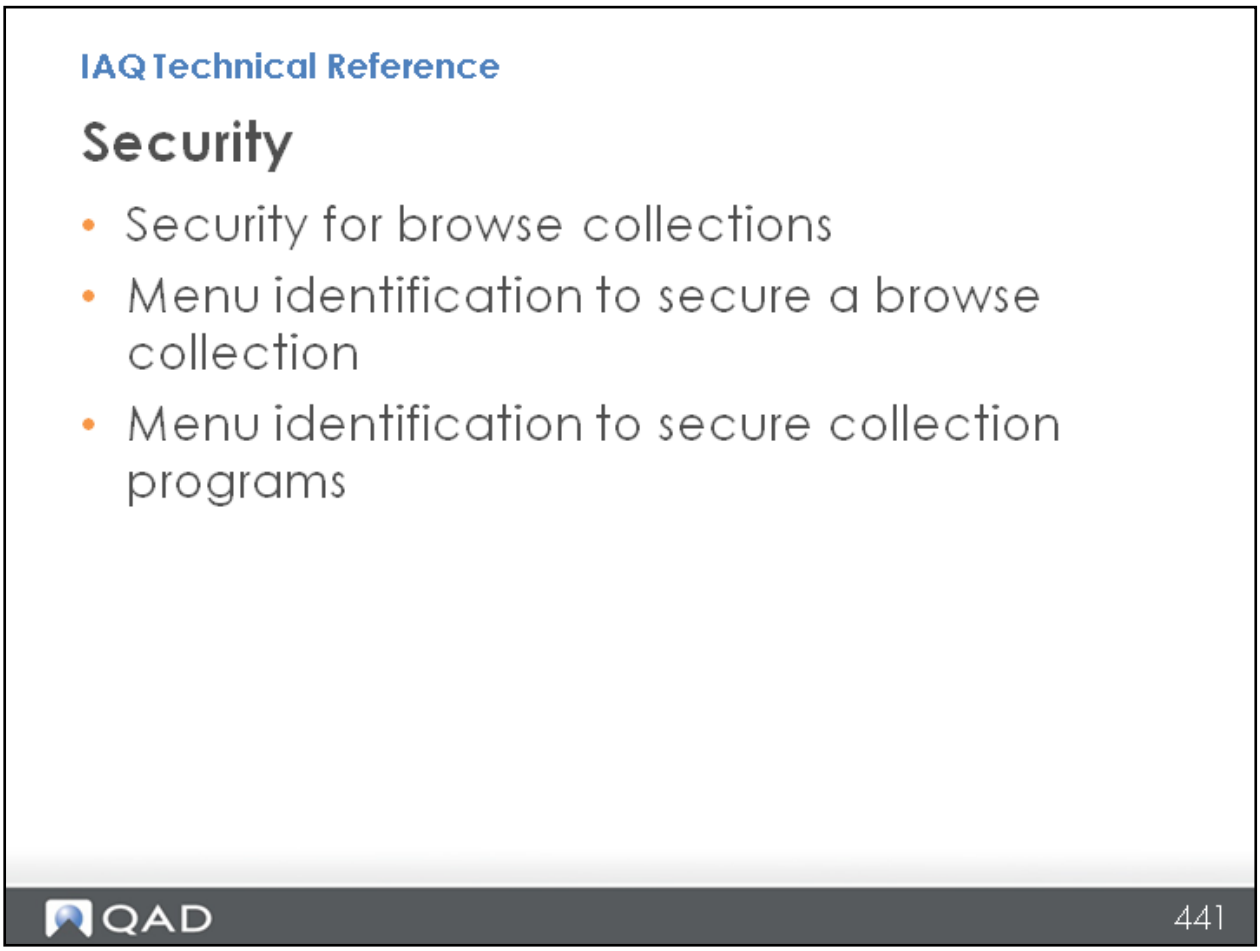
Note that minimizing higher level browses may hide that a record is in the modify state. Lower level records are still locked when the higher level record is in the modify state, even when it is hidden.

Browse Collections - Wrap-Up

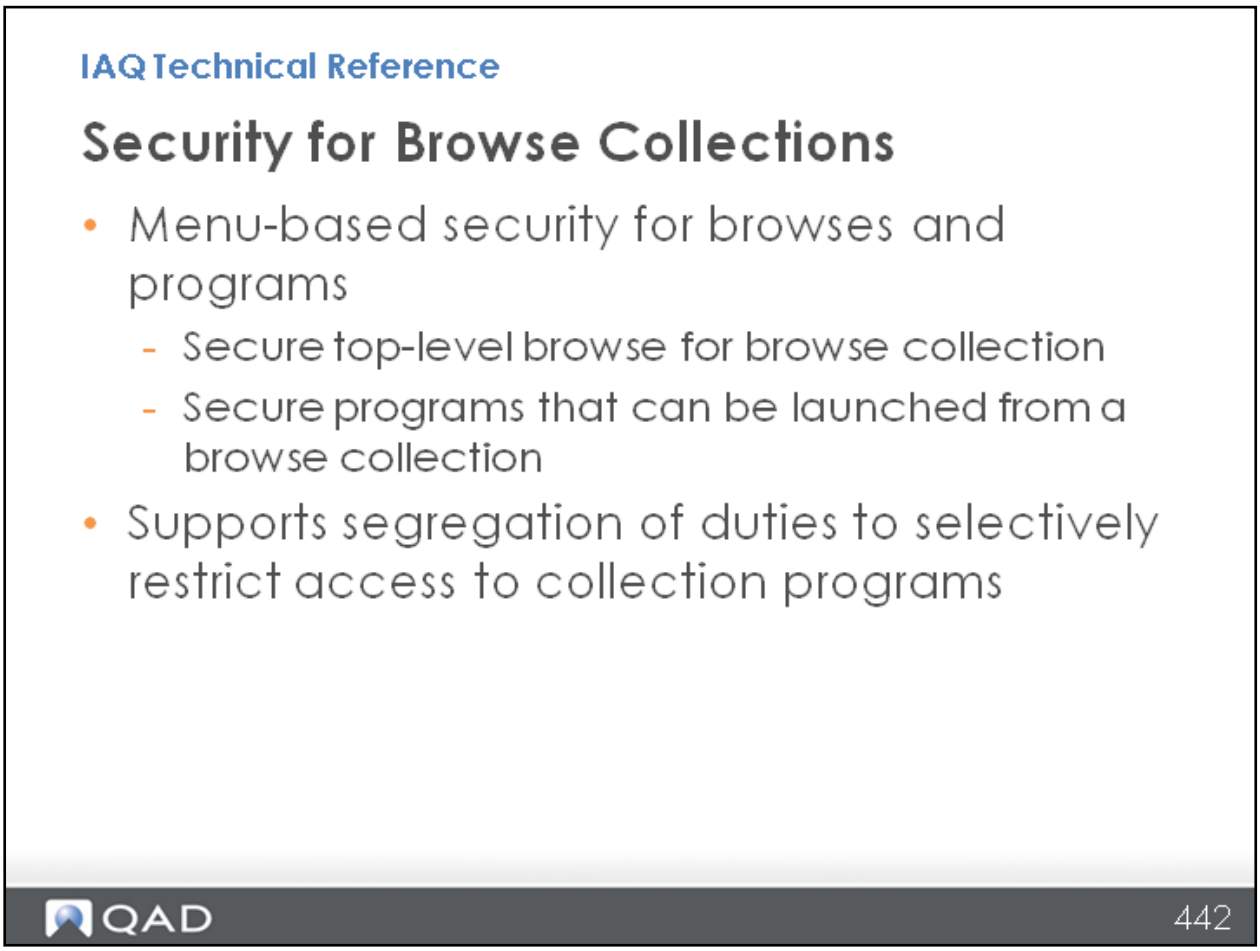


IAQ Security

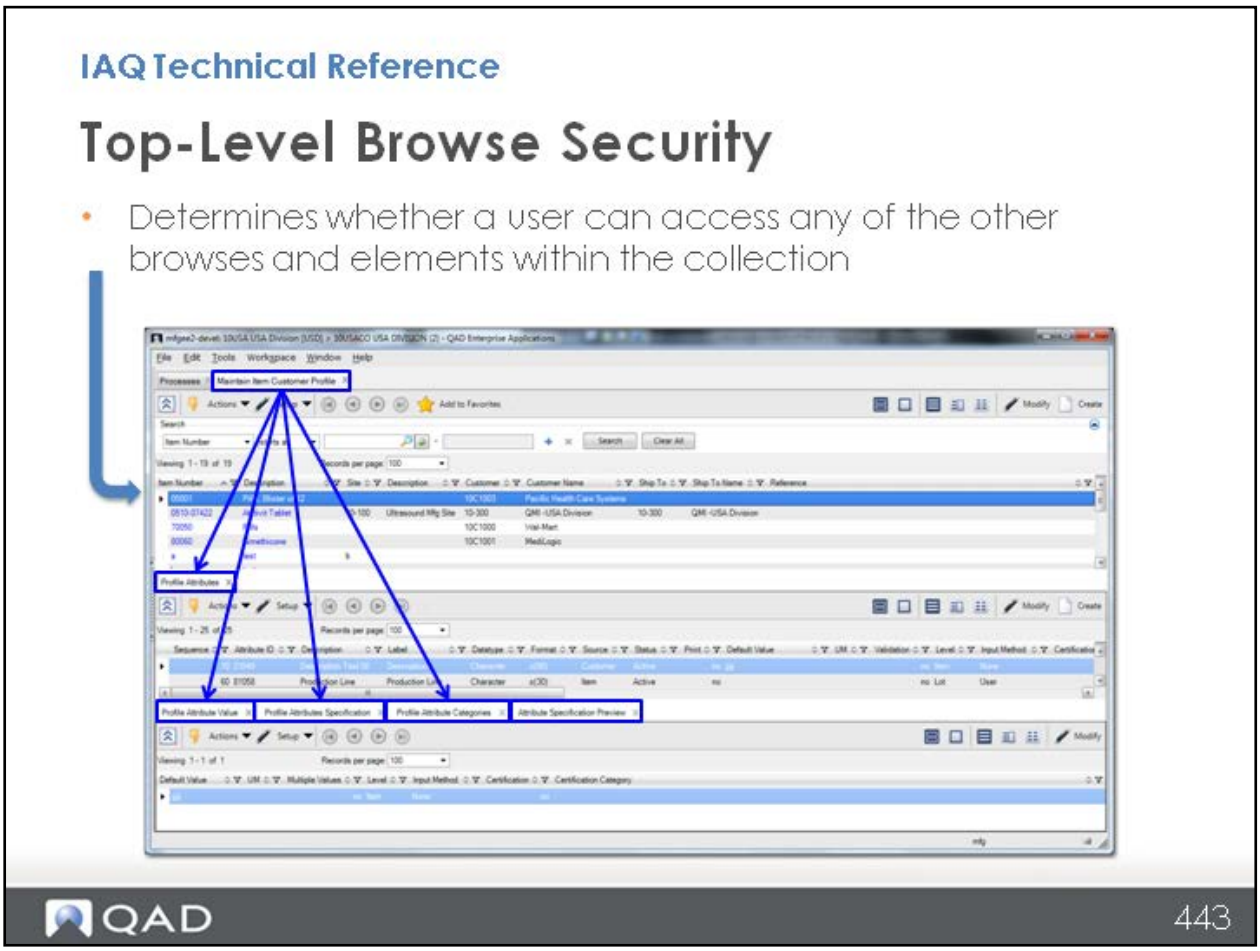
Security


IAQ Technical Reference
Security
Security for browse collections
Menu identification to secure a browse collection
Menu identification to secure collection programs
QAD
441

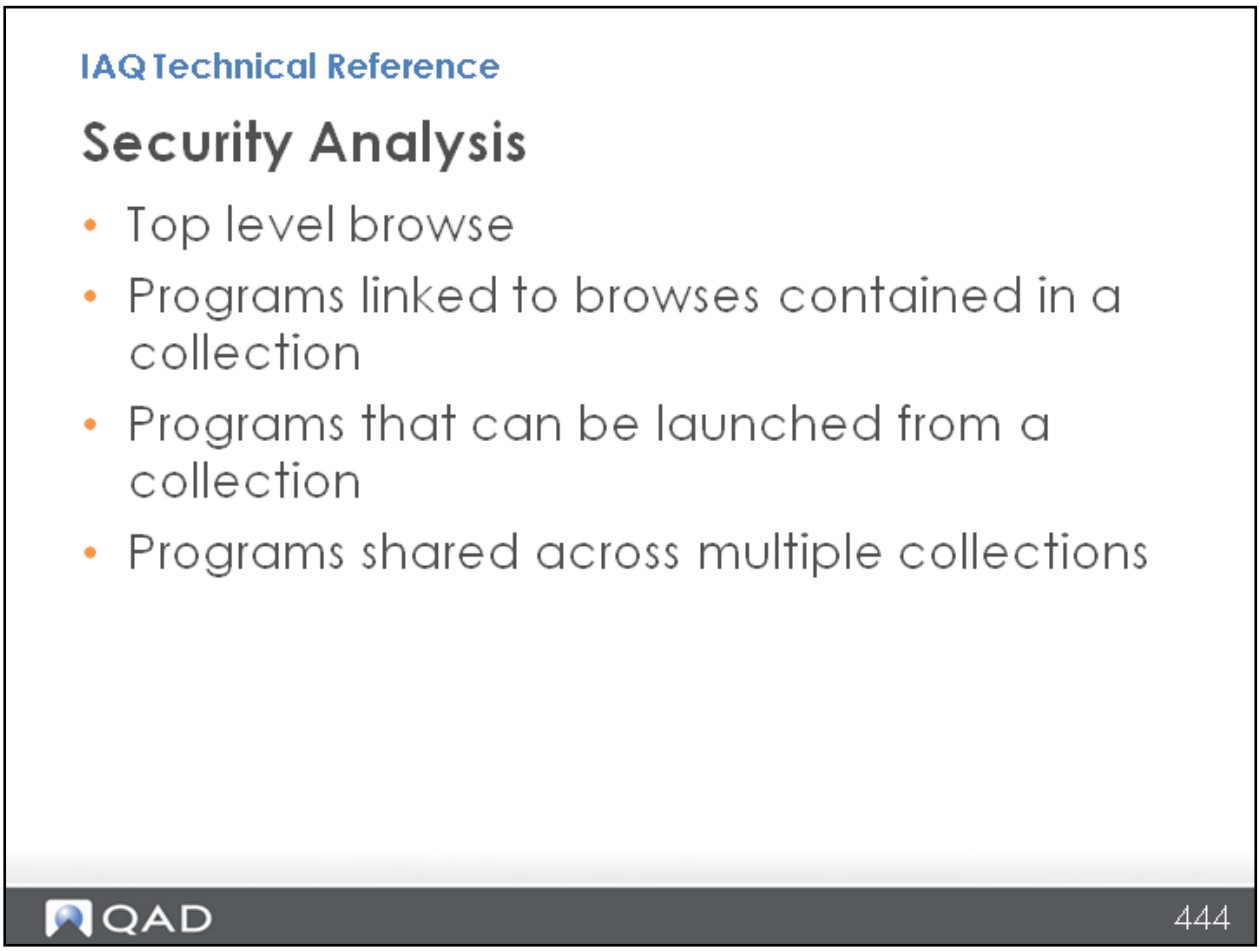
Security for Browse Collections



Top-Level Browse Security



Security Analysis

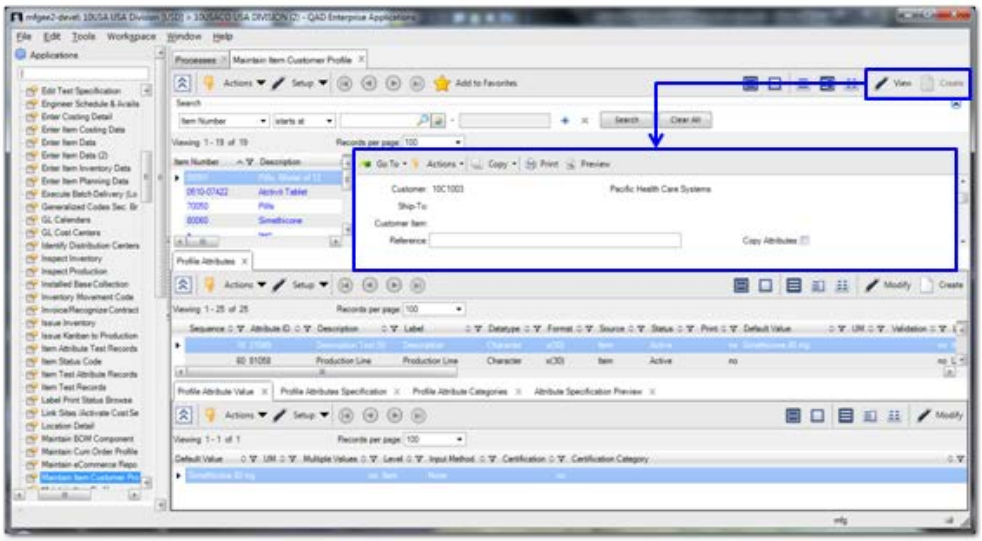


Browse Linked Programs

IAQ Technical Reference

Browse Linked Programs

- Need to secure programs linked to browses in a collection



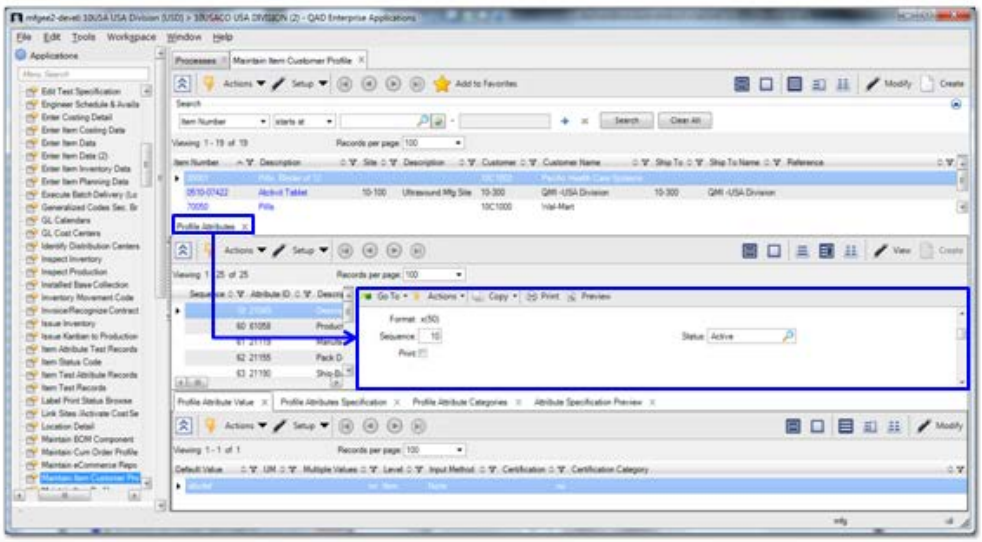
QAD 445

Browse Linked Programs

IAQ Technical Reference

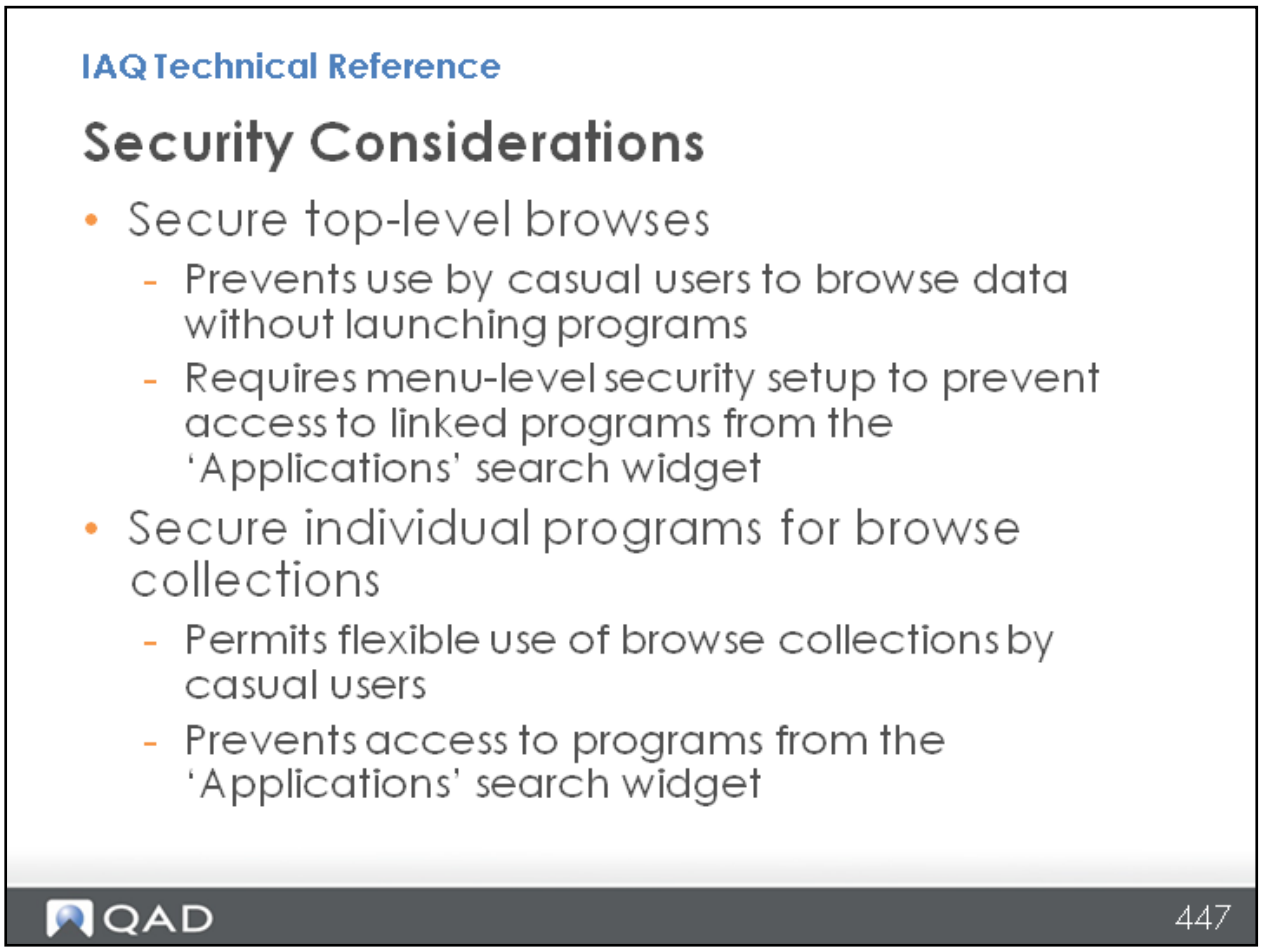
Browse Linked Programs

- Need to secure programs can be linked to all browses in a collection



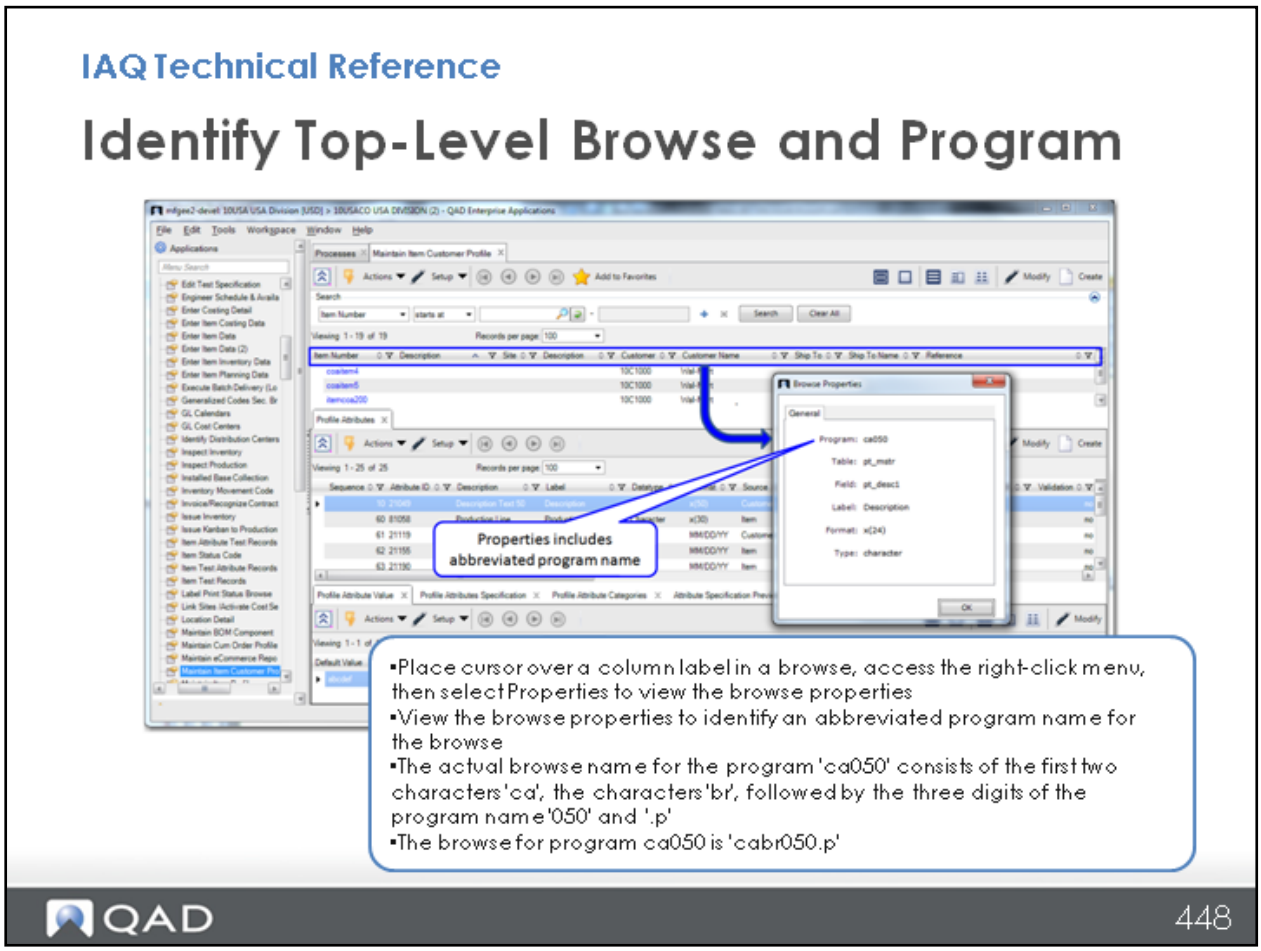
QAD 446

Security Considerations



A

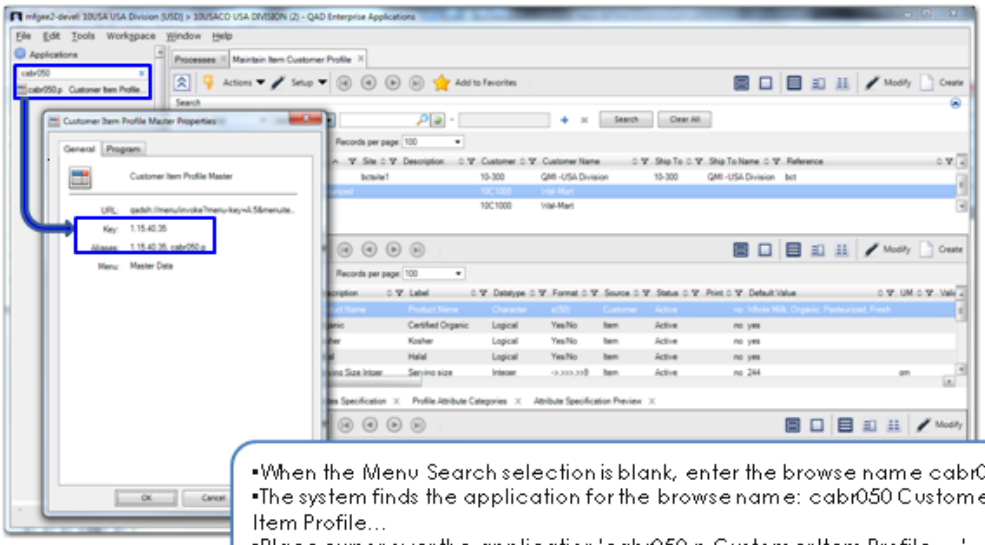
Identify Top-Level Browse and Program



Identify Application and Menu

IAQ Technical Reference

Identify Application and Menu



- When the Menu Search selection is blank, enter the browse name cabr050.p
- The system finds the application for the browse name: cabr050 Customer Item Profile...
- Place cursor over the application 'cabr050.p Customer Item Profile . . .', access the right-click menu for the application, then select Properties to view the application properties
- View the application properties menu to find the menu and selection for the browse -- 1.15.40.35

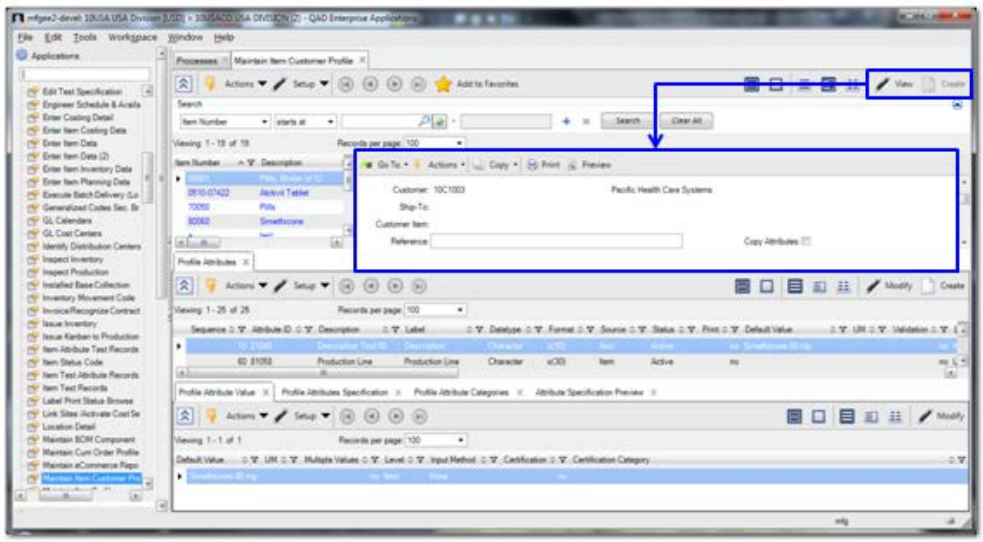
QAD 449

Initiate Program Linked to Top-Level Browse

IAQ Technical Reference

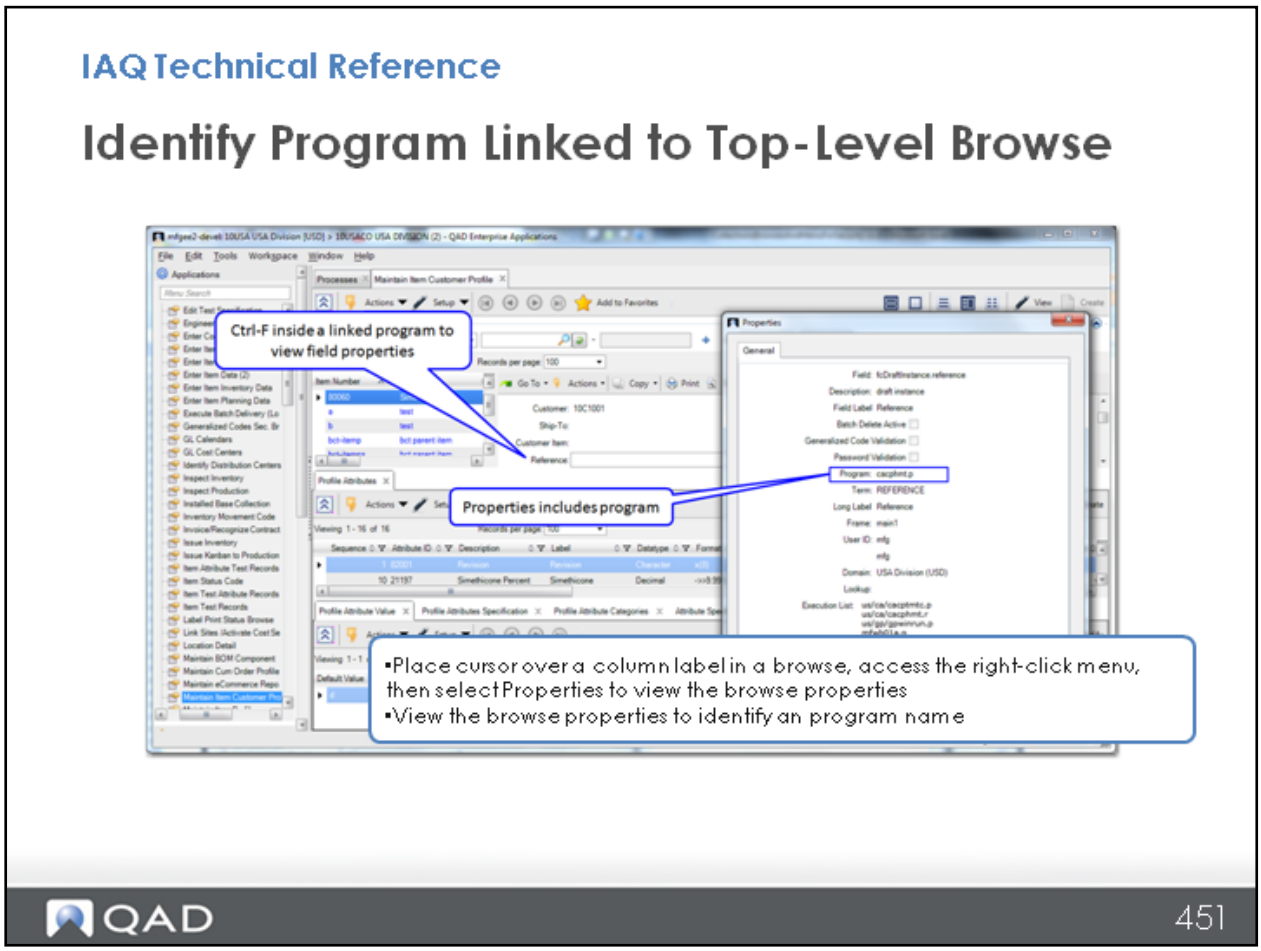
Initiate Program Linked to Top-Level Browse

- Initiate program using modify, create, or double click on a browse row



QAD 450

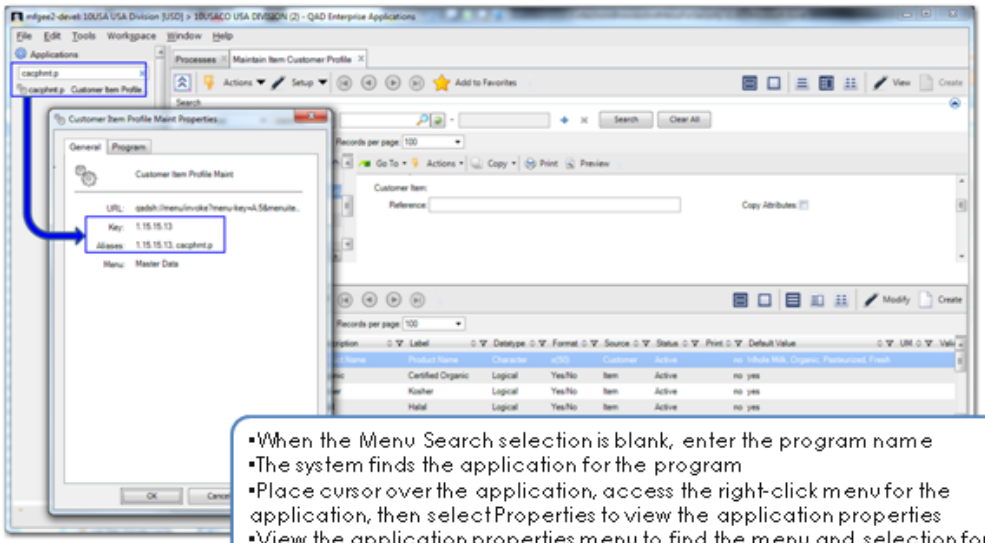
Identify Program Linked to Top-Level Browse



Identify Menu for the Linked Program

IAQ Technical Reference

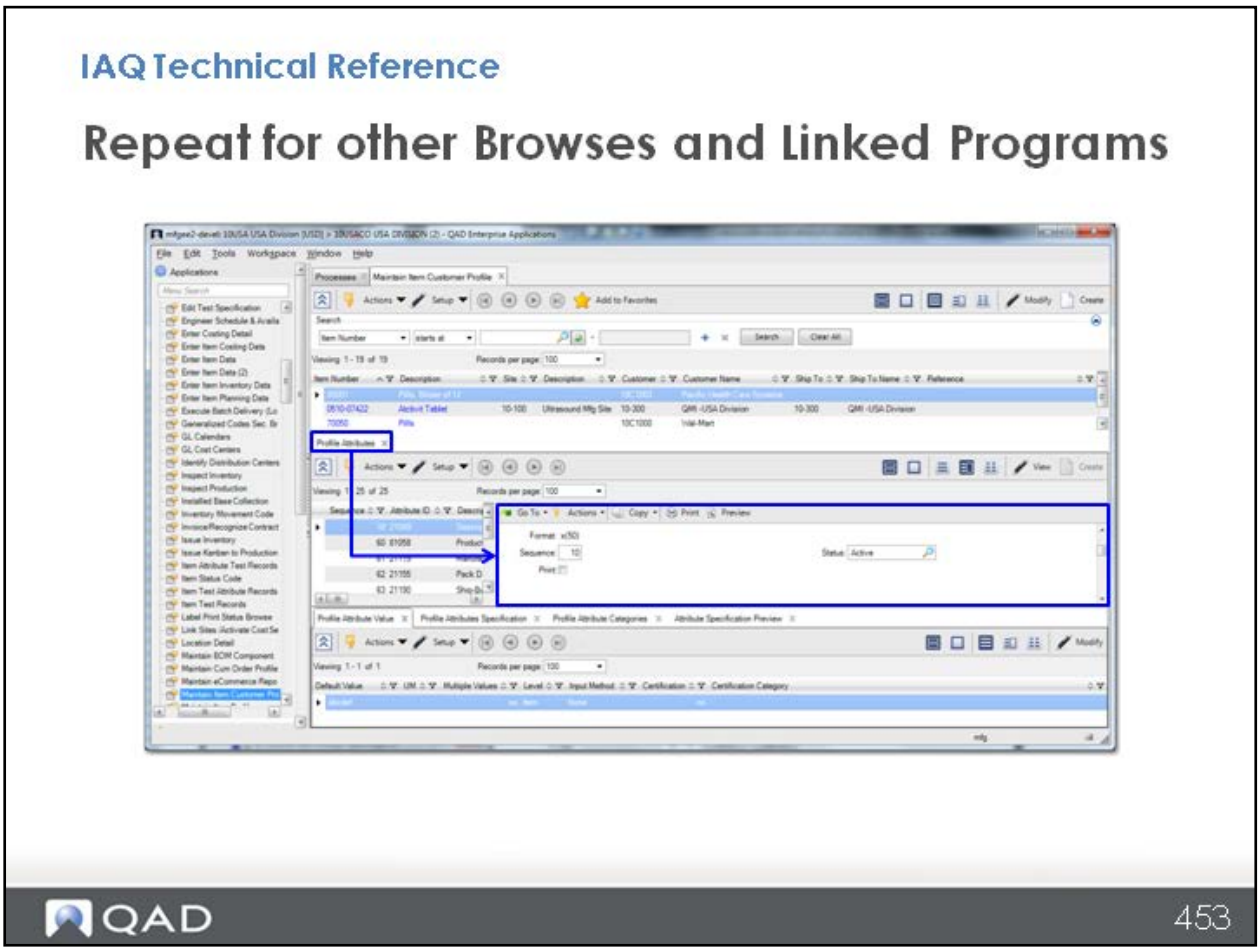
Identify Menu for the Linked Program



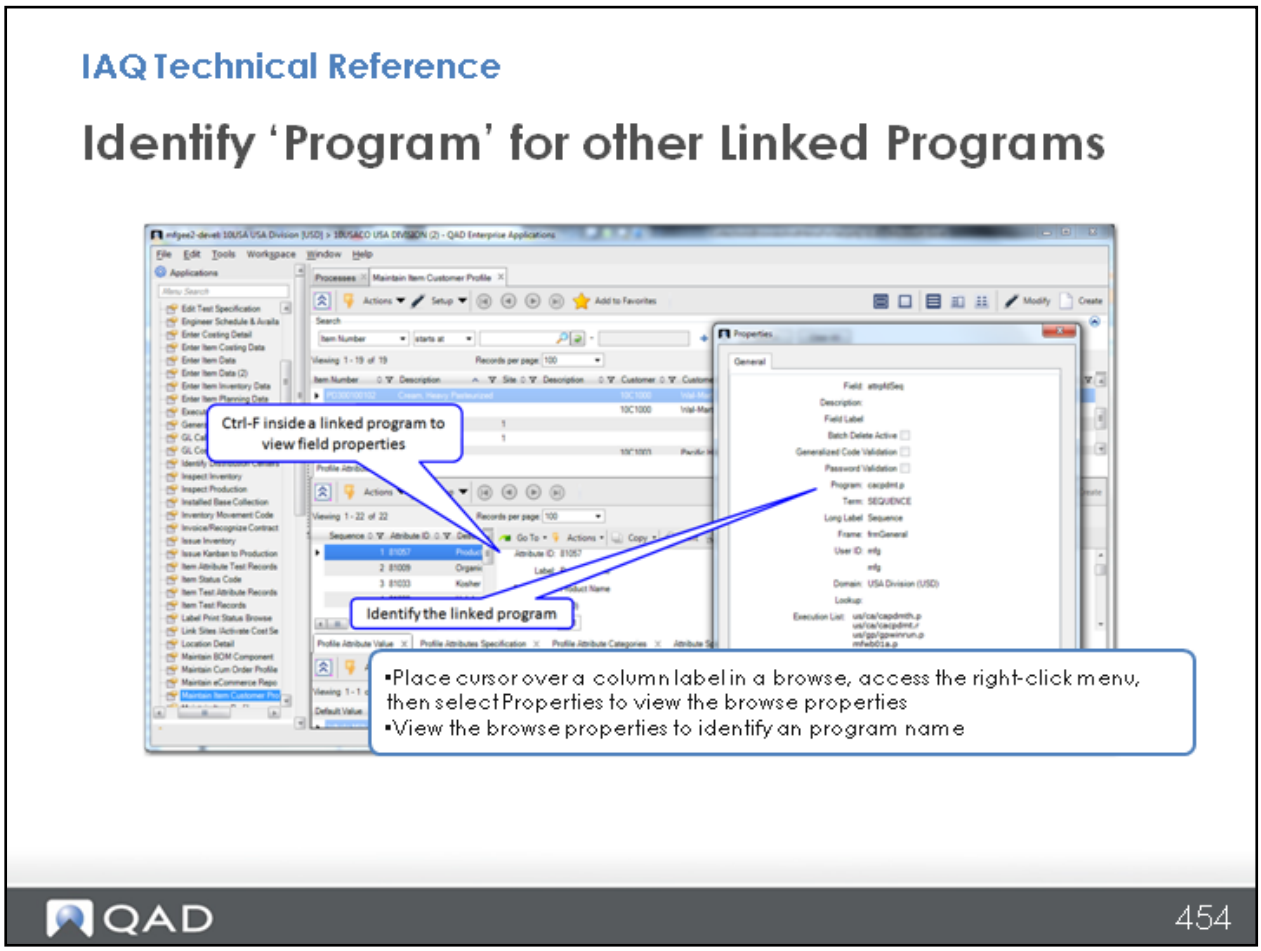
- When the Menu Search selection is blank, enter the program name
- The system finds the application for the program
- Place cursor over the application, access the right-click menu for the application, then select Properties to view the application properties
- View the application properties menu to find the menu and selection for the browse

QAD 452

Repeat for other Browses and Linked Programs



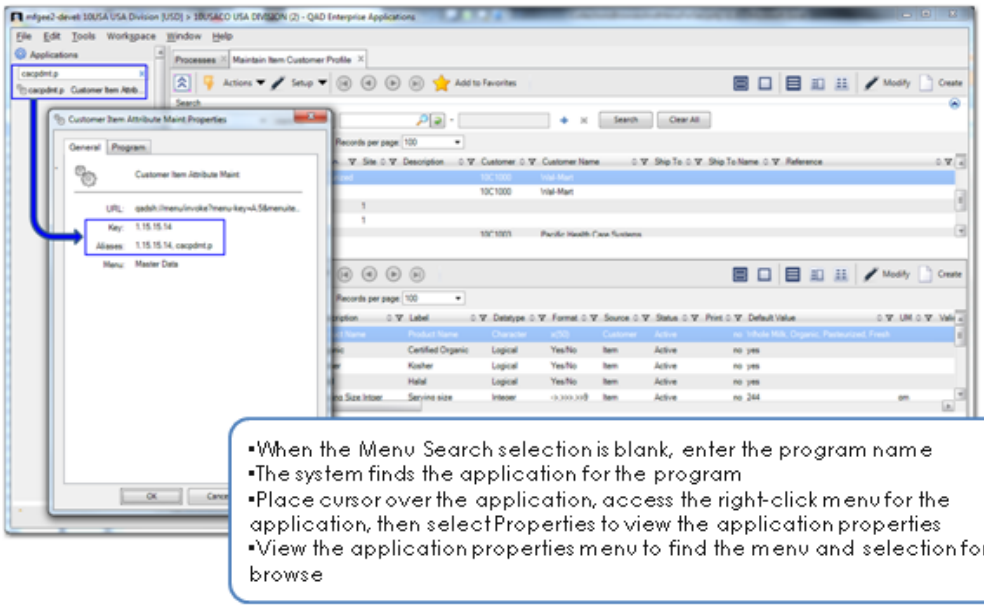
Identify ‘Program’ for other Linked Programs



Identify Menu for other Linked Programs

IAQ Technical Reference

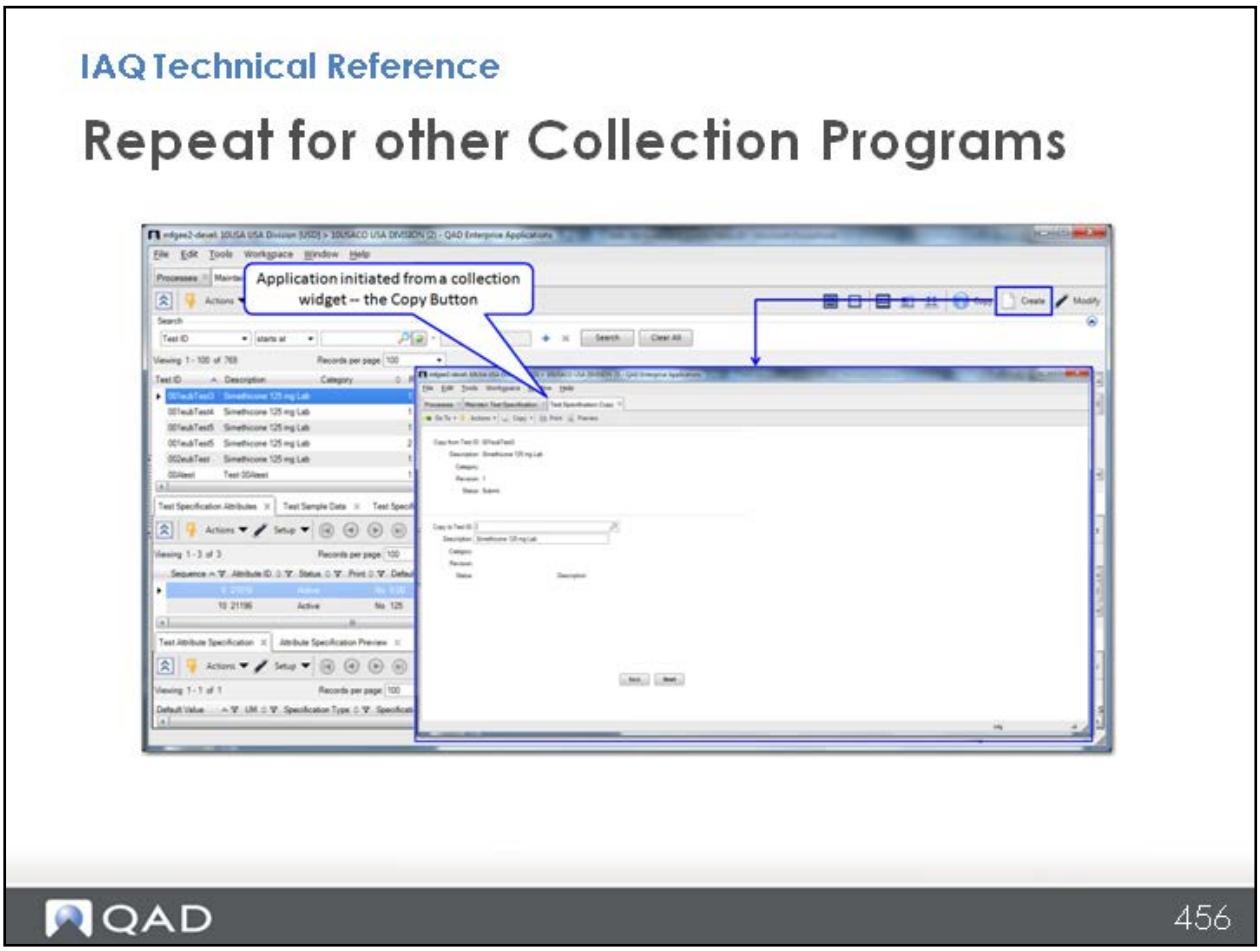
Identify Menu for other Linked Programs



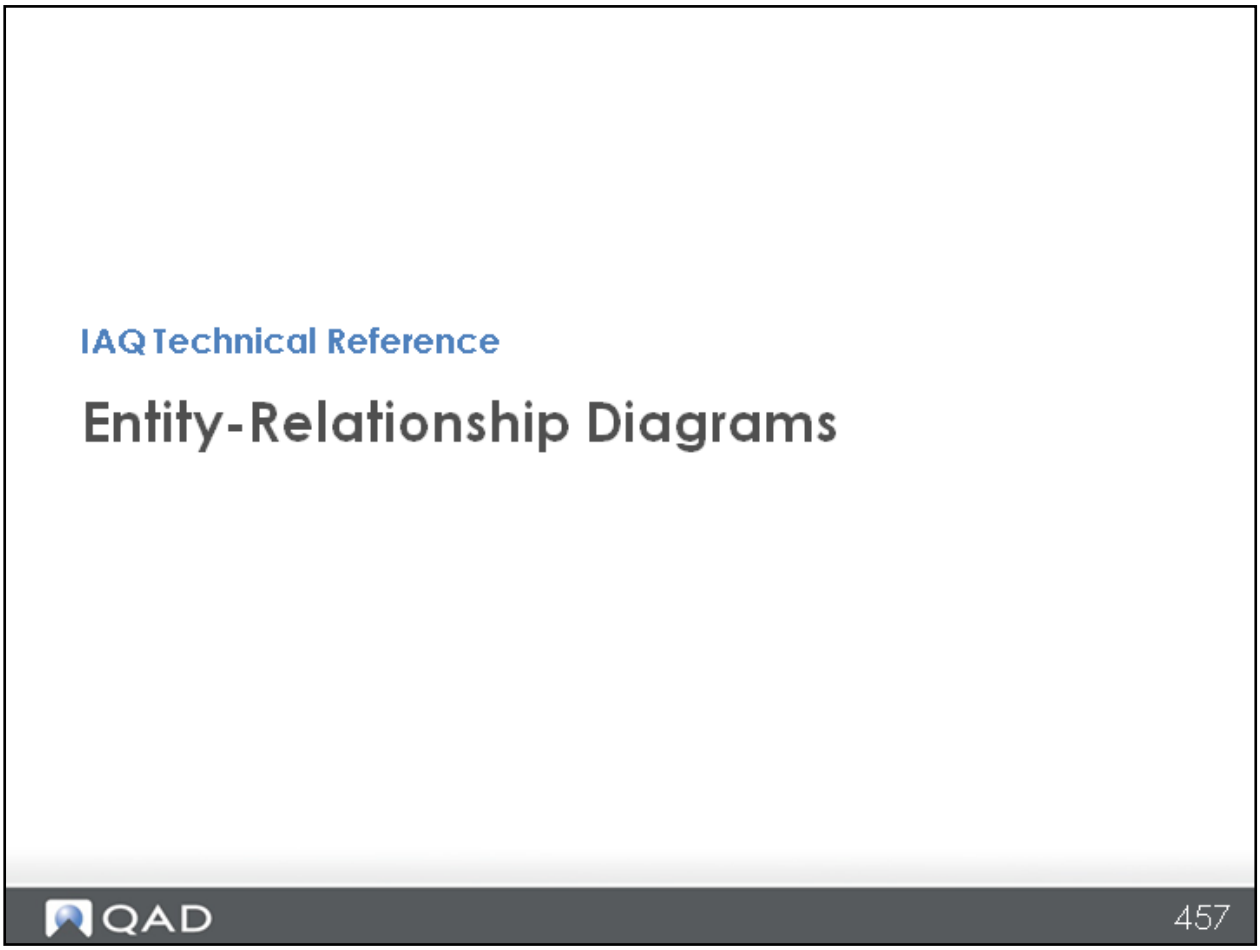
- When the Menu Search selection is blank, enter the program name
- The system finds the application for the program
- Place cursor over the application, access the right-click menu for the application, then select Properties to view the application properties
- View the application properties menu to find the menu and selection for the browse

QAD 455

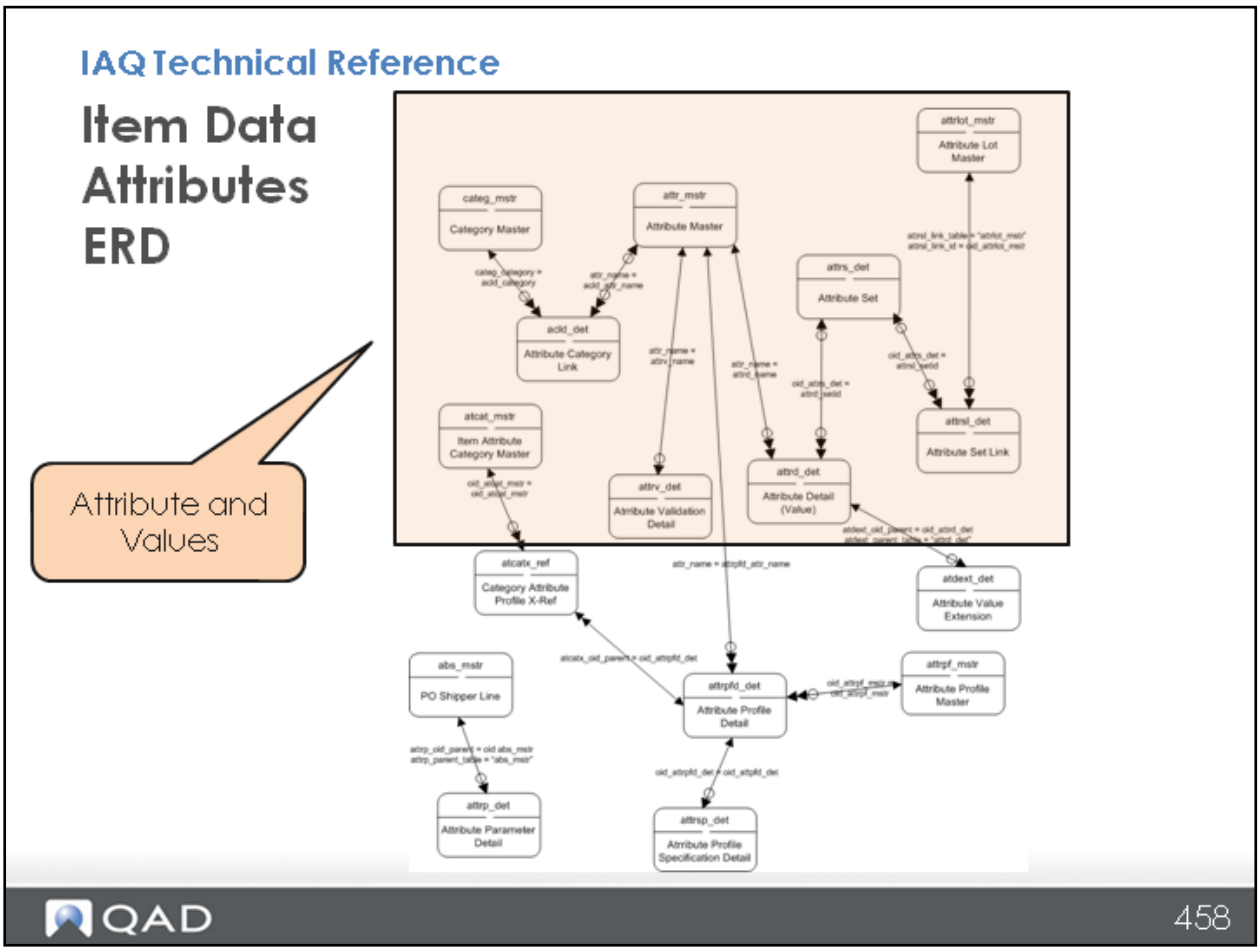
Repeat for other Collection Programs



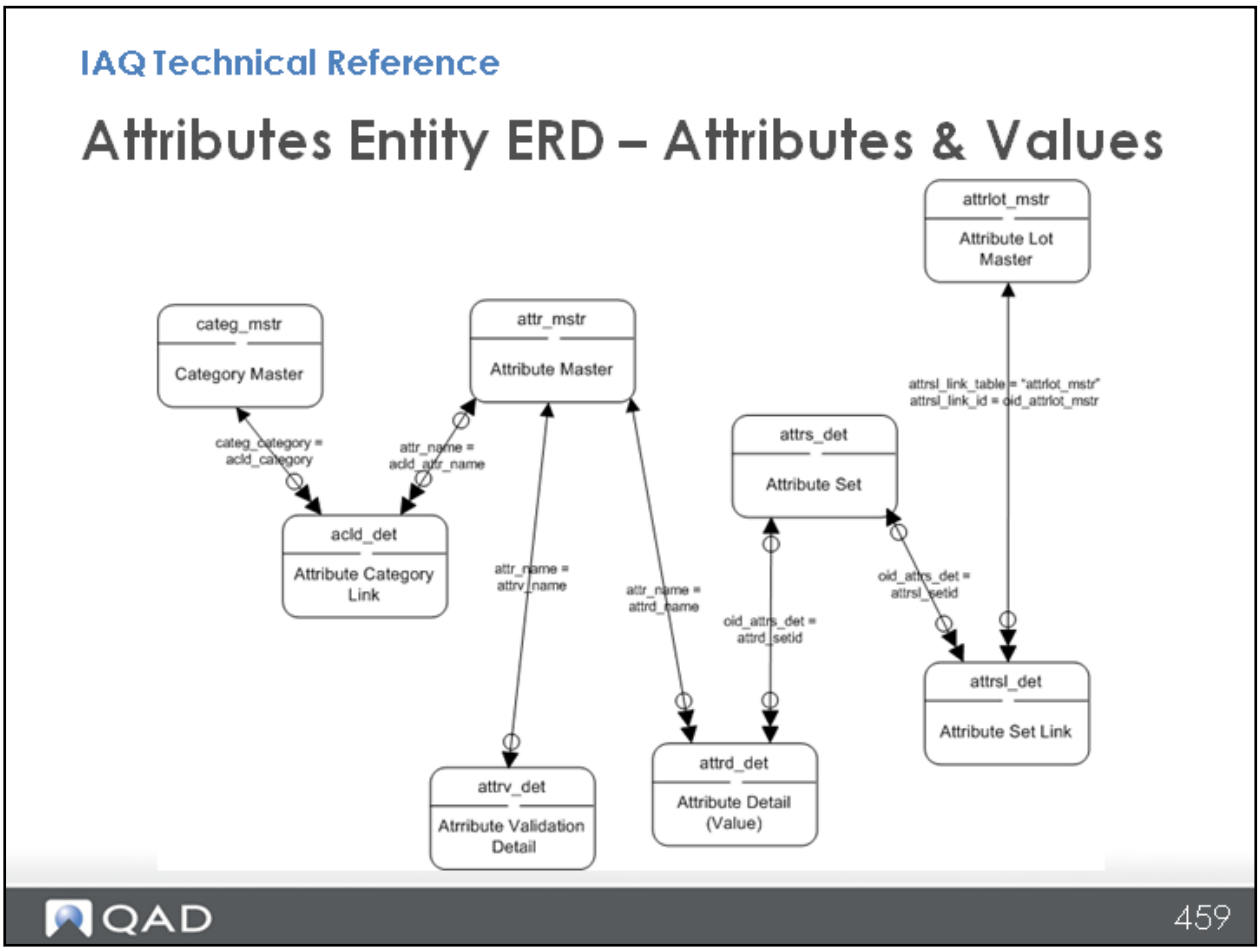
Entity-Relationship Diagrams



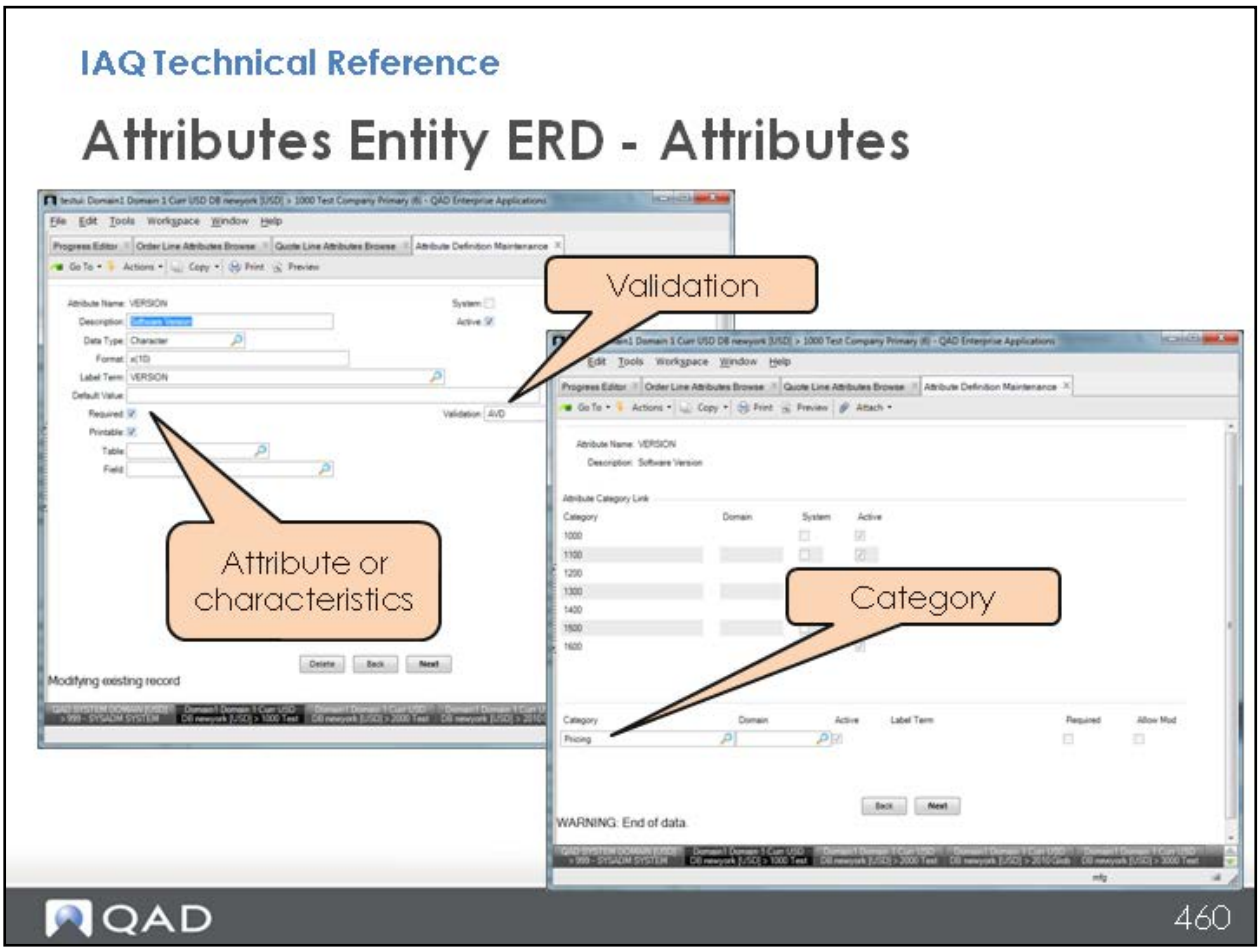
Item Data Attributes ERD



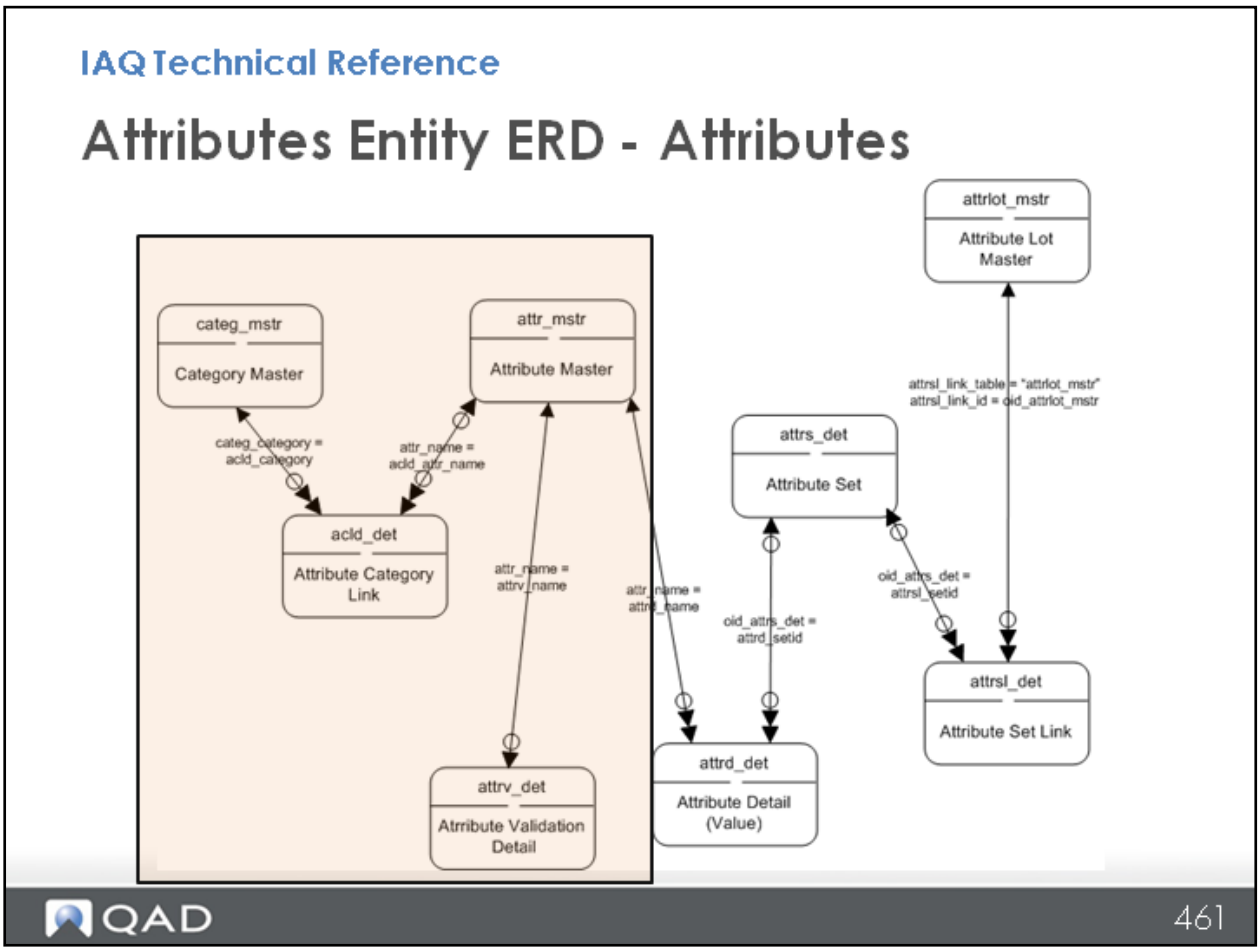
Attributes Entity ERD – Attributes & Values



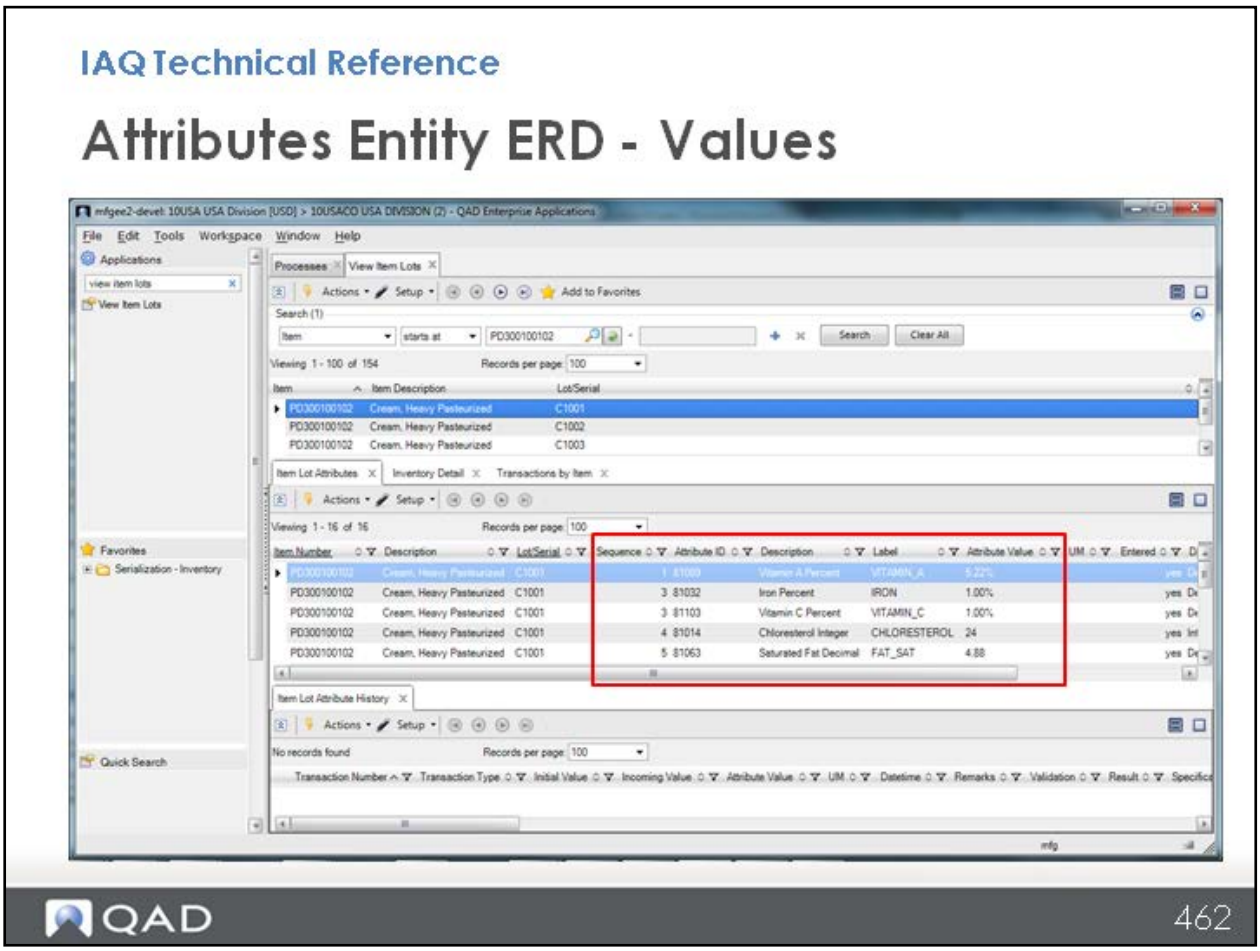
Attributes Entity ERD - Attributes



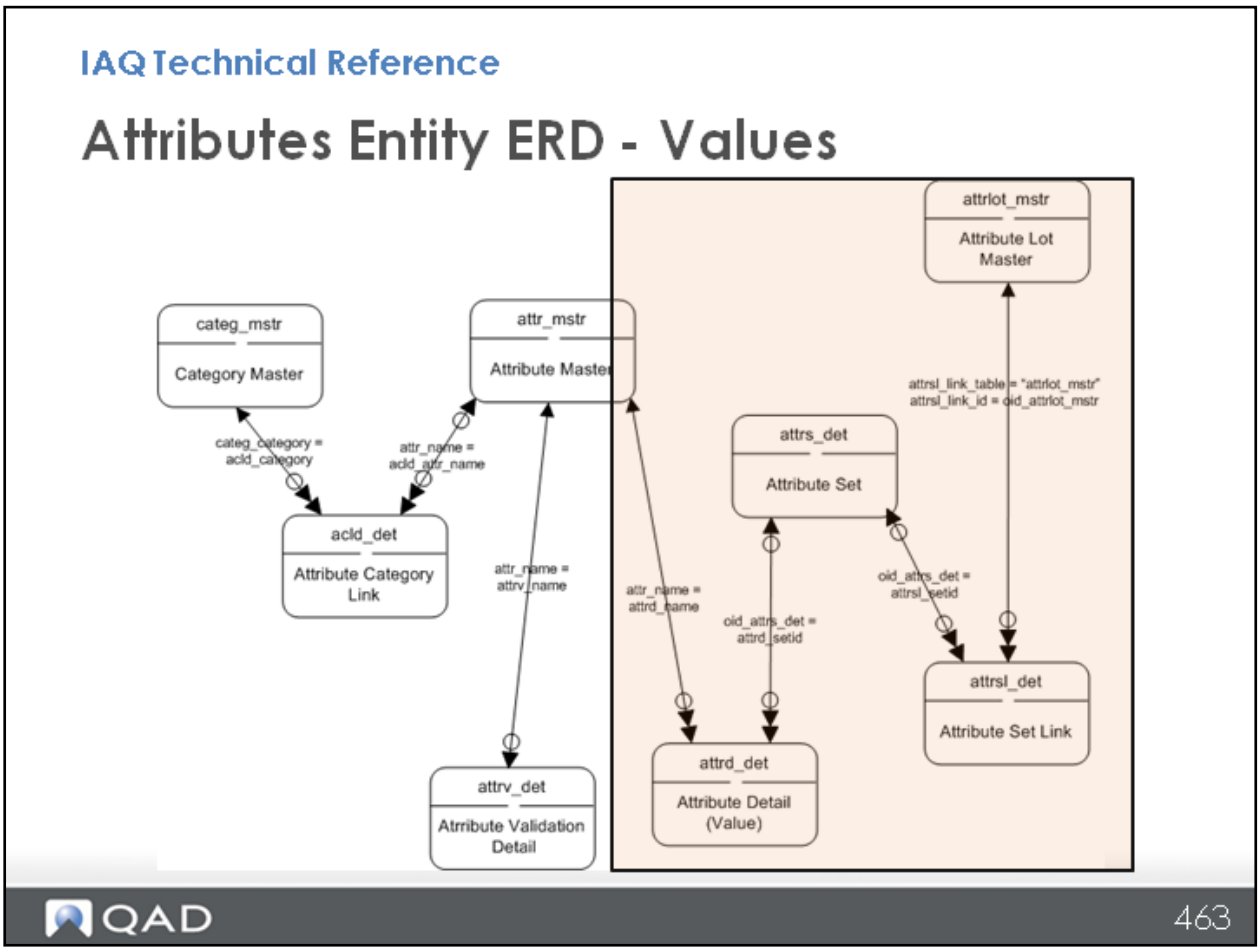
Attributes Entity ERD - Attributes



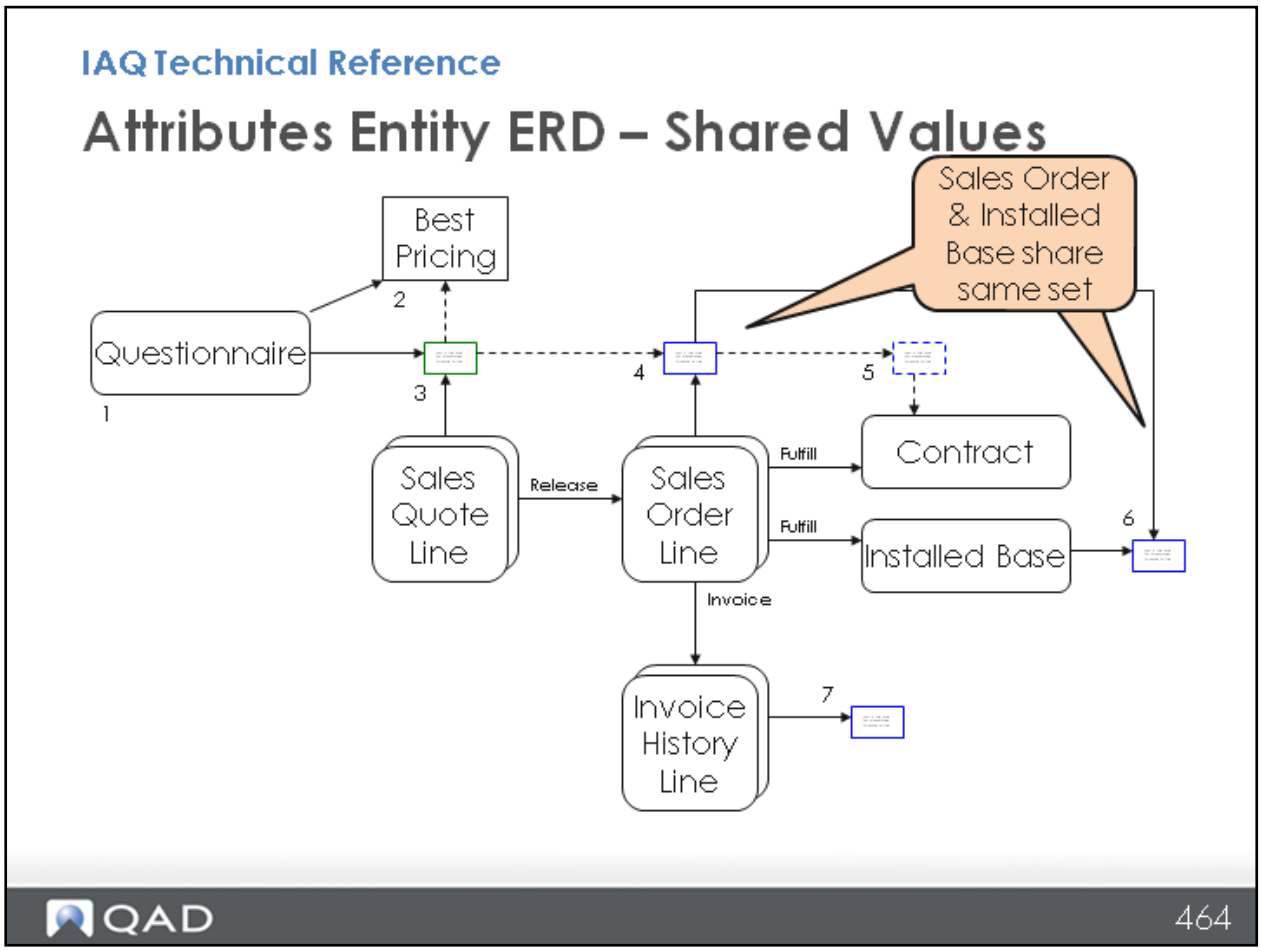
Attributes Entity ERD - Values



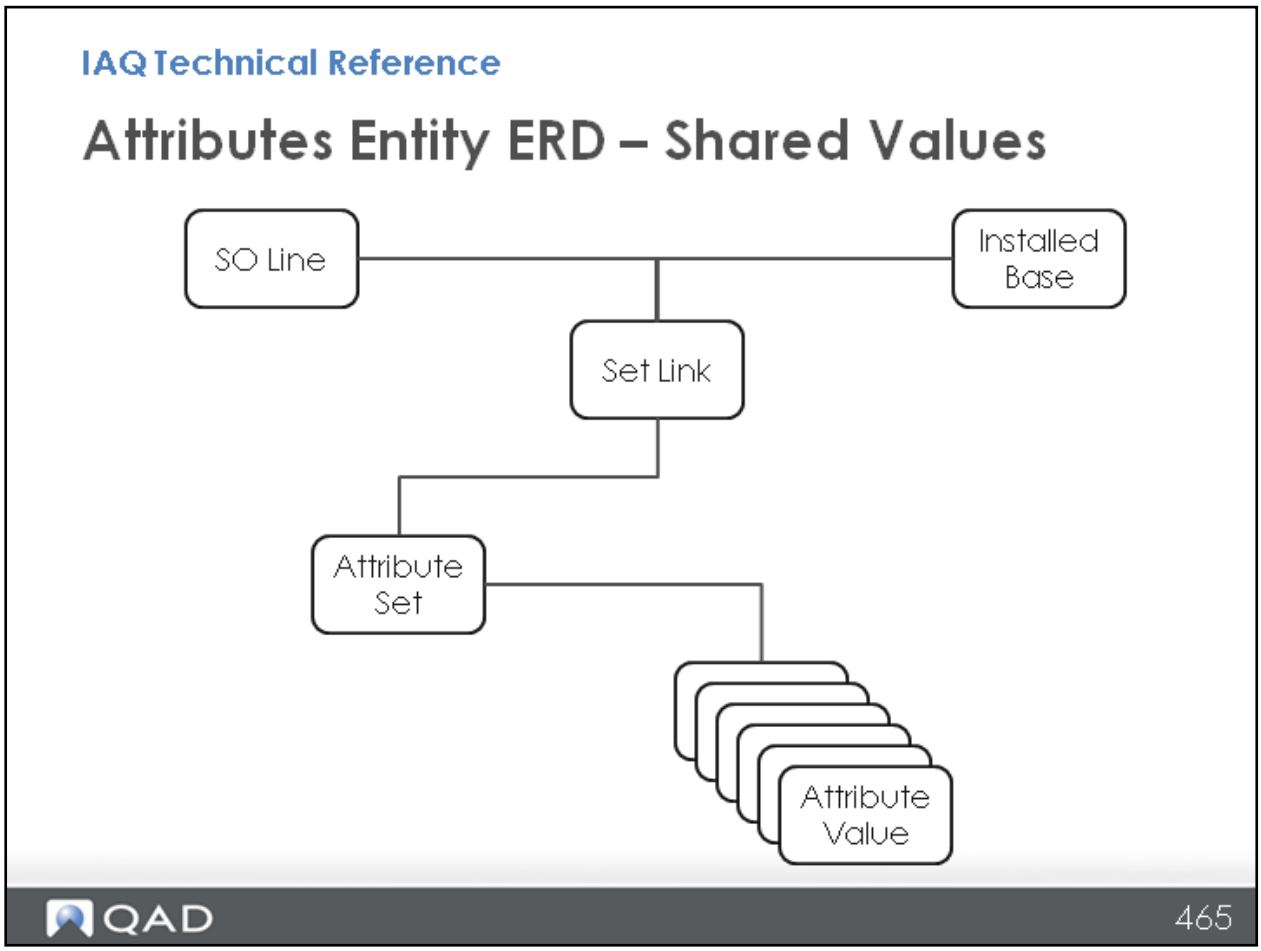
Attributes Entity ERD - Values



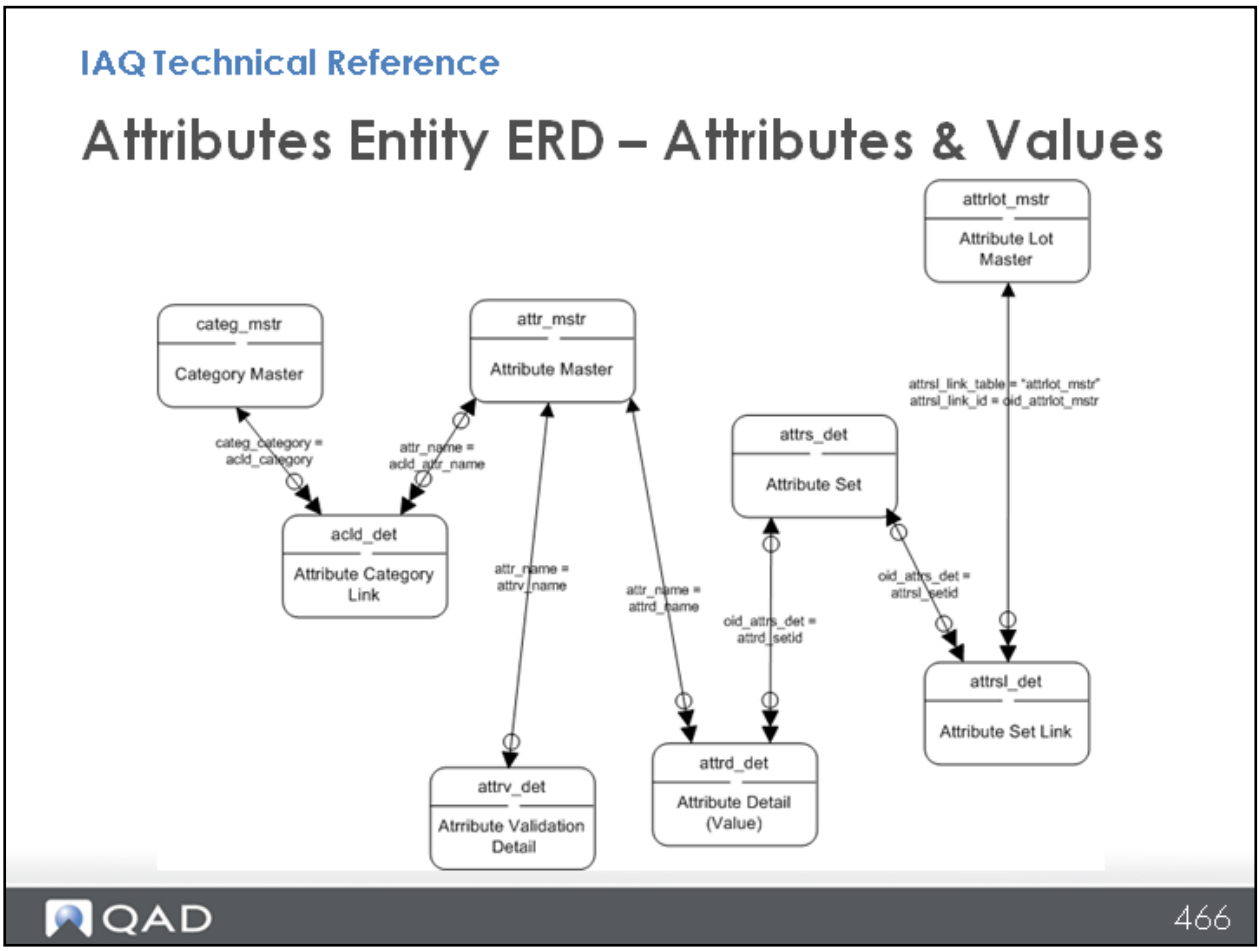
Attributes Entity ERD – Shared Values



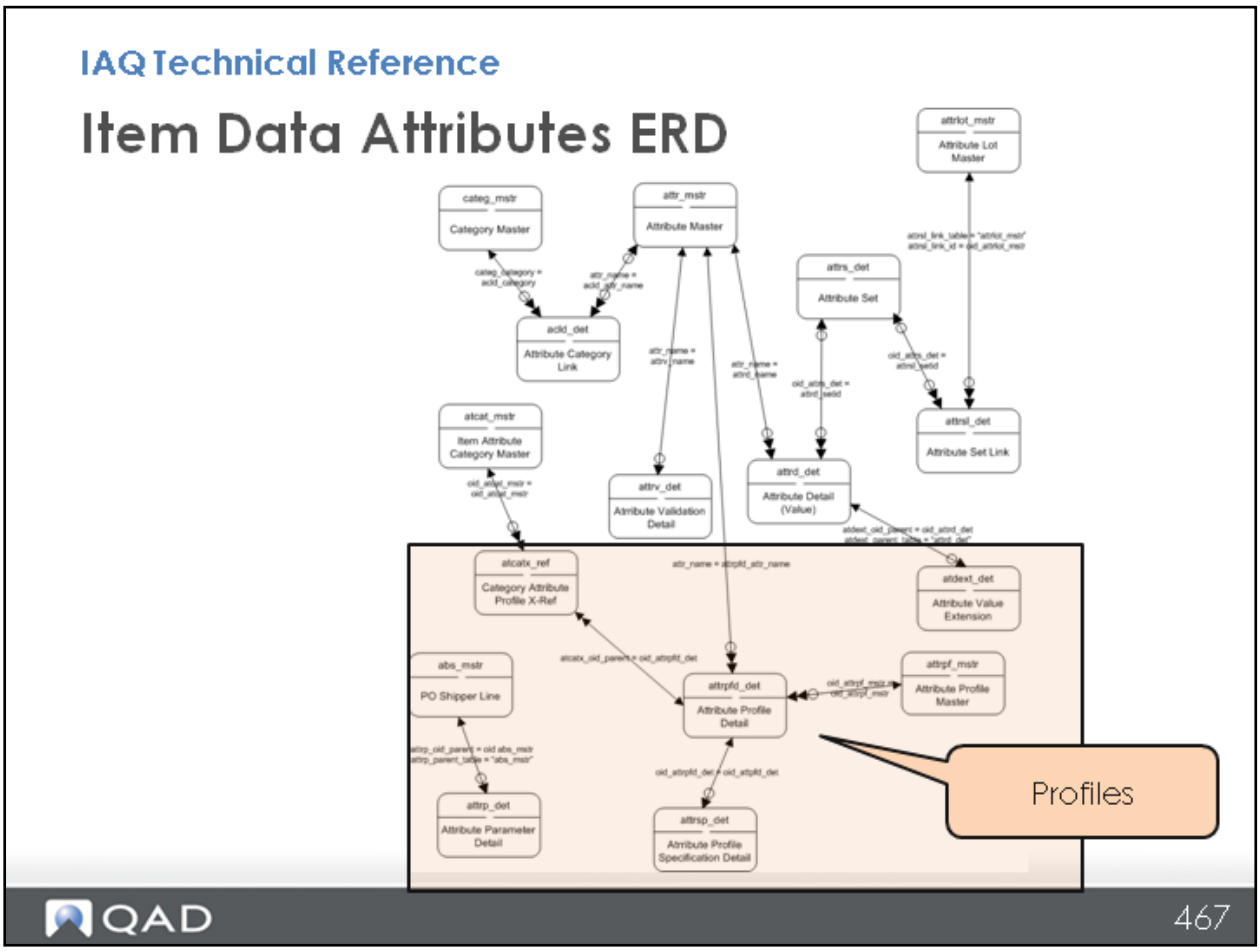
Attributes Entity ERD – Shared Values



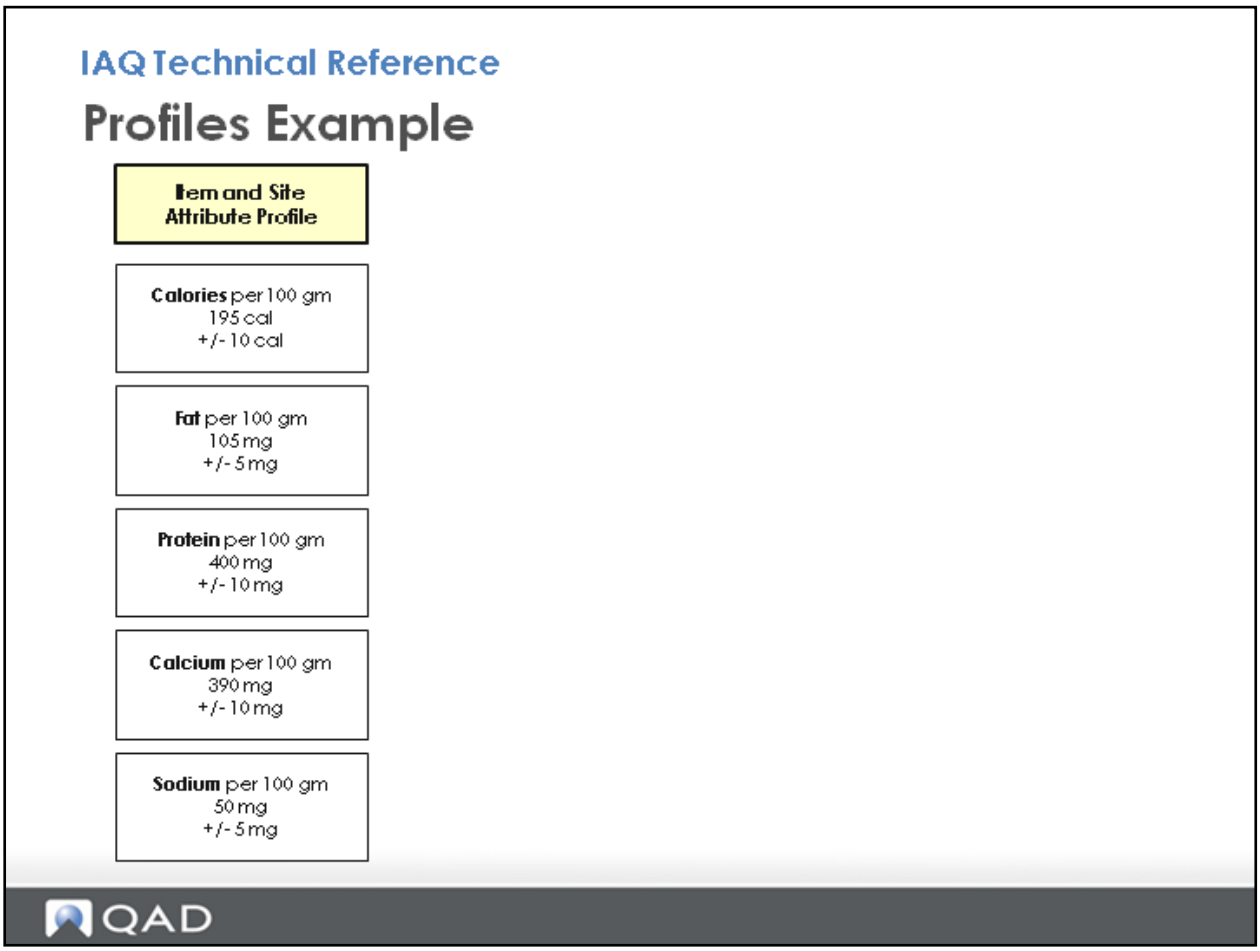
Attributes Entity ERD – Attributes & Values

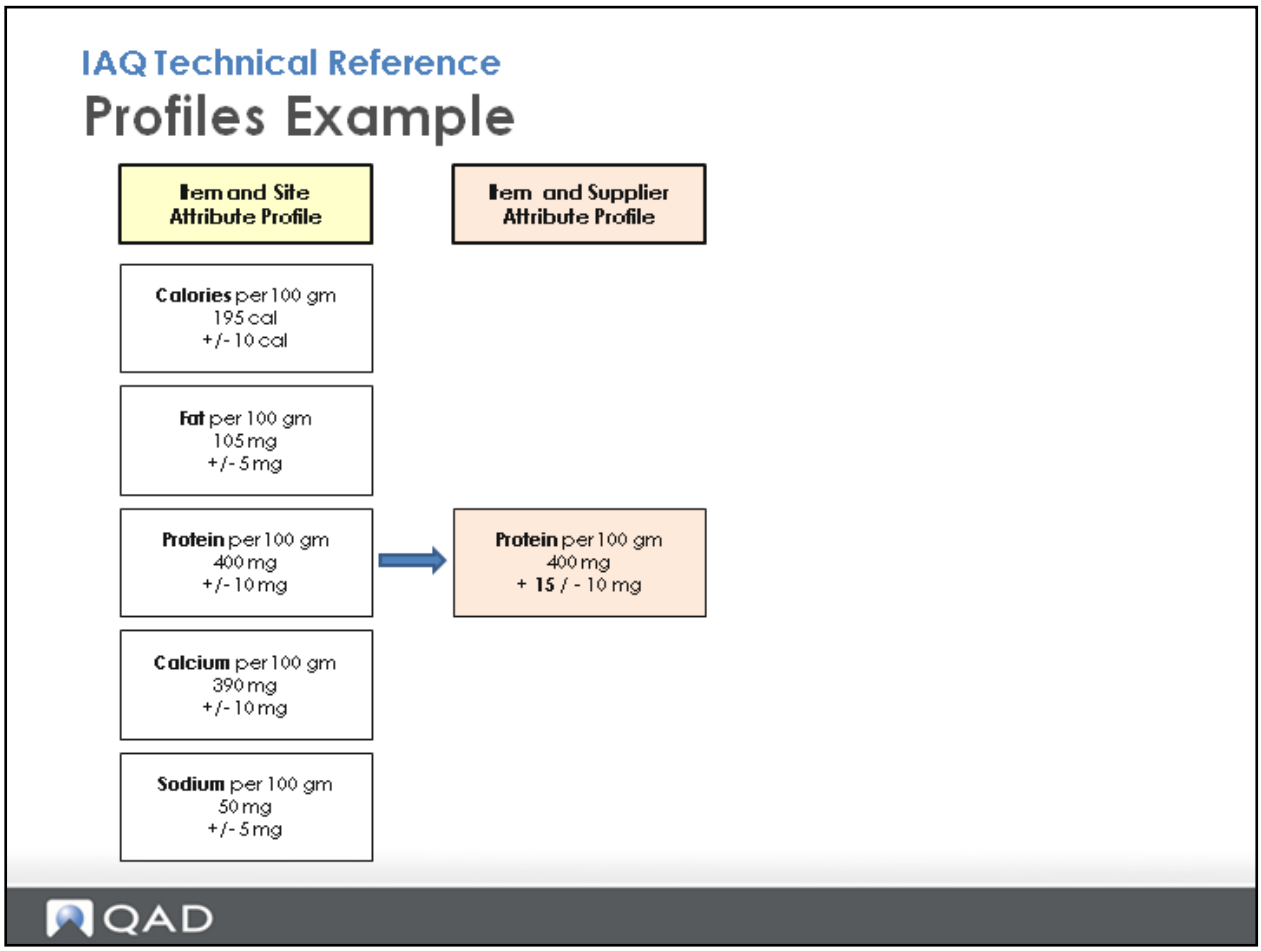


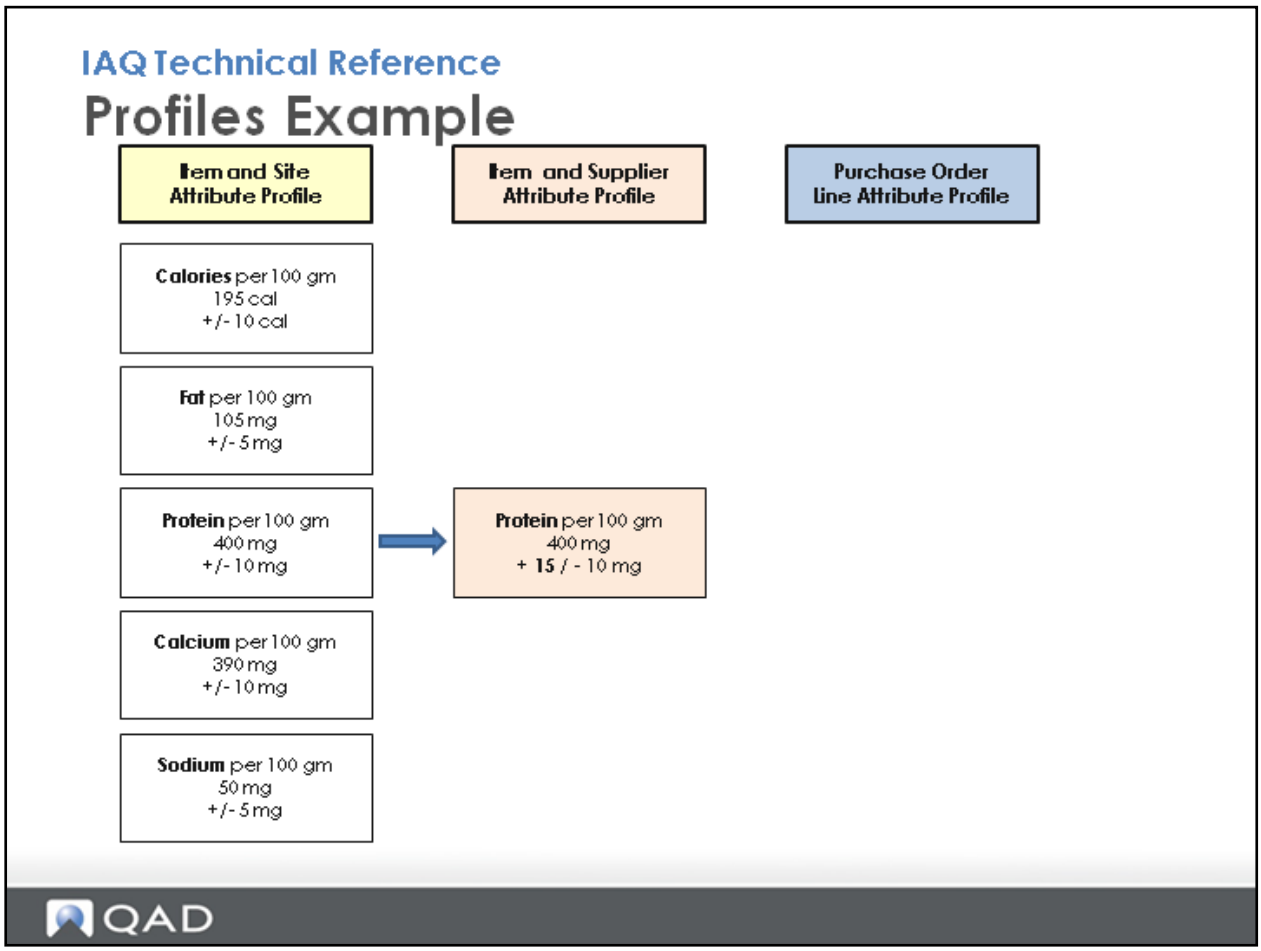
Item Data Attributes ERD

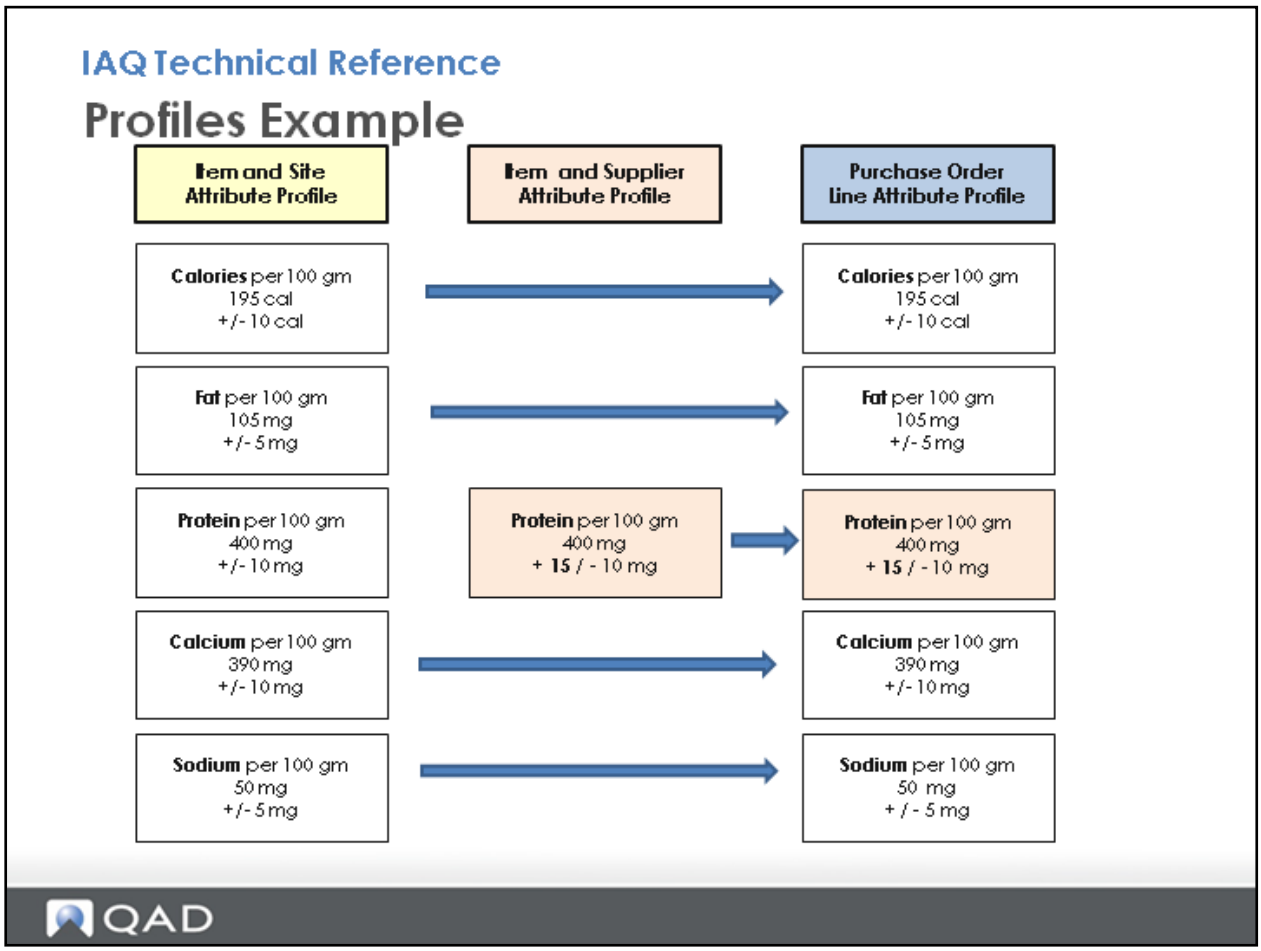


Profiles Example

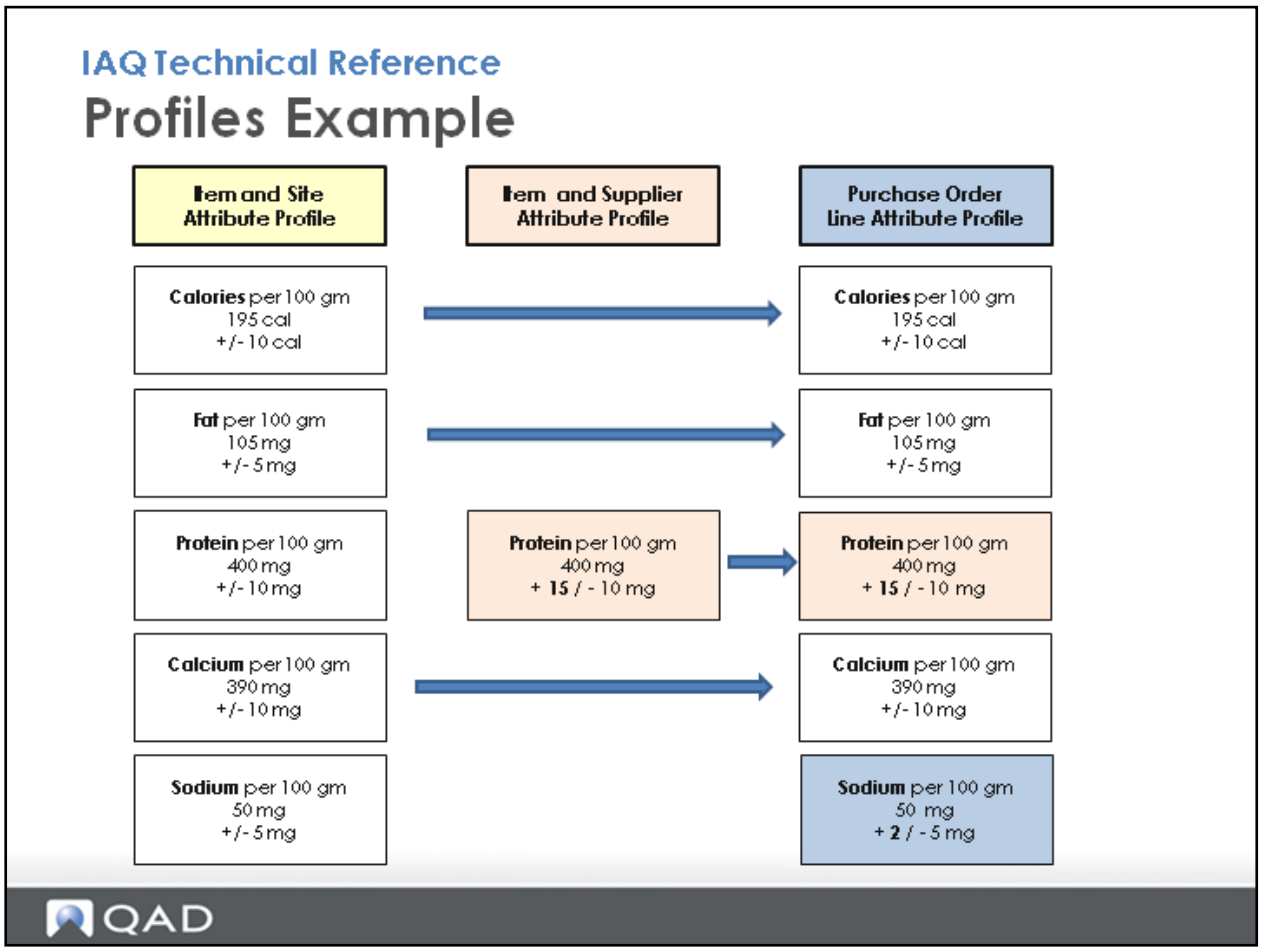



IAQ Technical Reference
Profiles Example
Item and Site Attribute Profile
Item and Supplier Attribute Profile
Calories per 100 gm
195 cal
+/- 10 cal
Fat per 100 gm
105 mg
+/- 5 mg
Protein per 100 gm
400 mg
+/- 10 mg
Protein per 100 gm
400 mg
+ 15 / - 10 mg
Calcium per 100 gm
390 mg
+/- 10 mg
Sodium per 100 gm
50 mg
+/- 5 mg
QAD

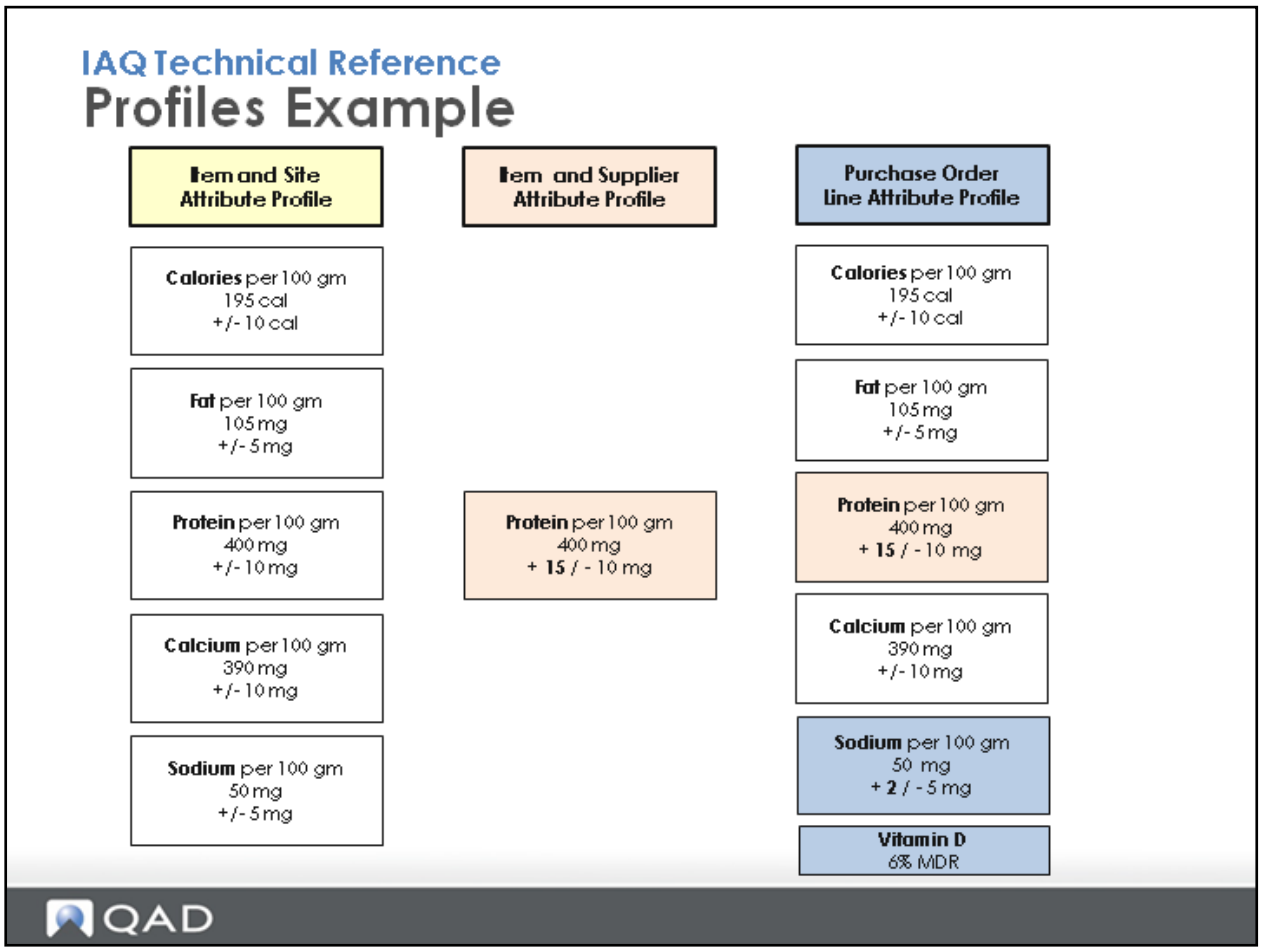

IAQ Technical Reference
Profiles Example
Item and Site Attribute Profile
Item and Supplier Attribute Profile
Purchase Order Line Attribute Profile
Calories per 100 gm
195 cal
+/- 10 cal
Fat per 100 gm
105 mg
+/- 5 mg
Protein per 100 gm
400 mg
+/- 10 mg
Protein per 100 gm
400 mg
+ 15 / - 10 mg
Calcium per 100 gm
390 mg
+/- 10 mg
Sodium per 100 gm
50 mg
+/- 5 mg
QAD



Color-coating shows the source of the specification

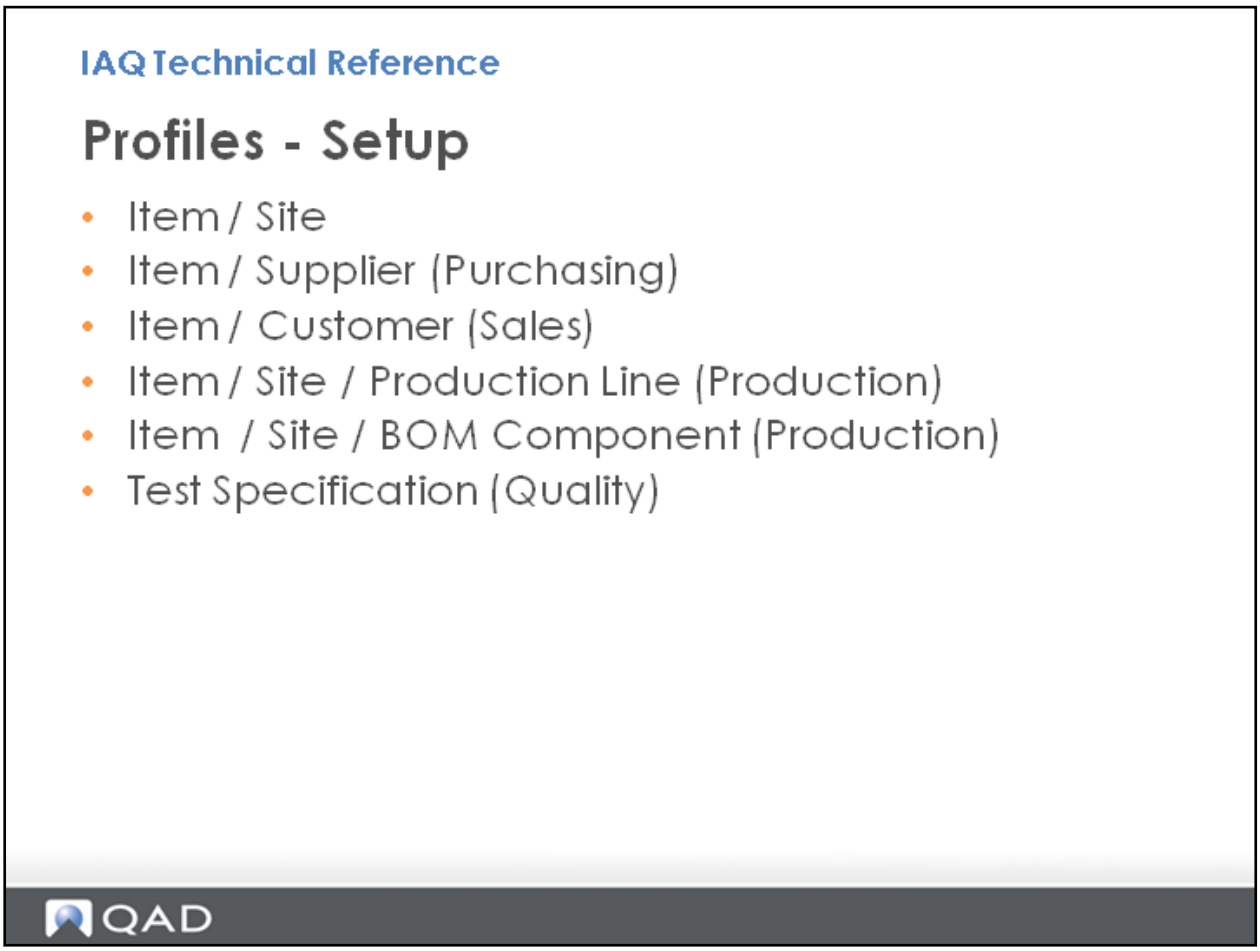


Color-coating shows the source of the specification

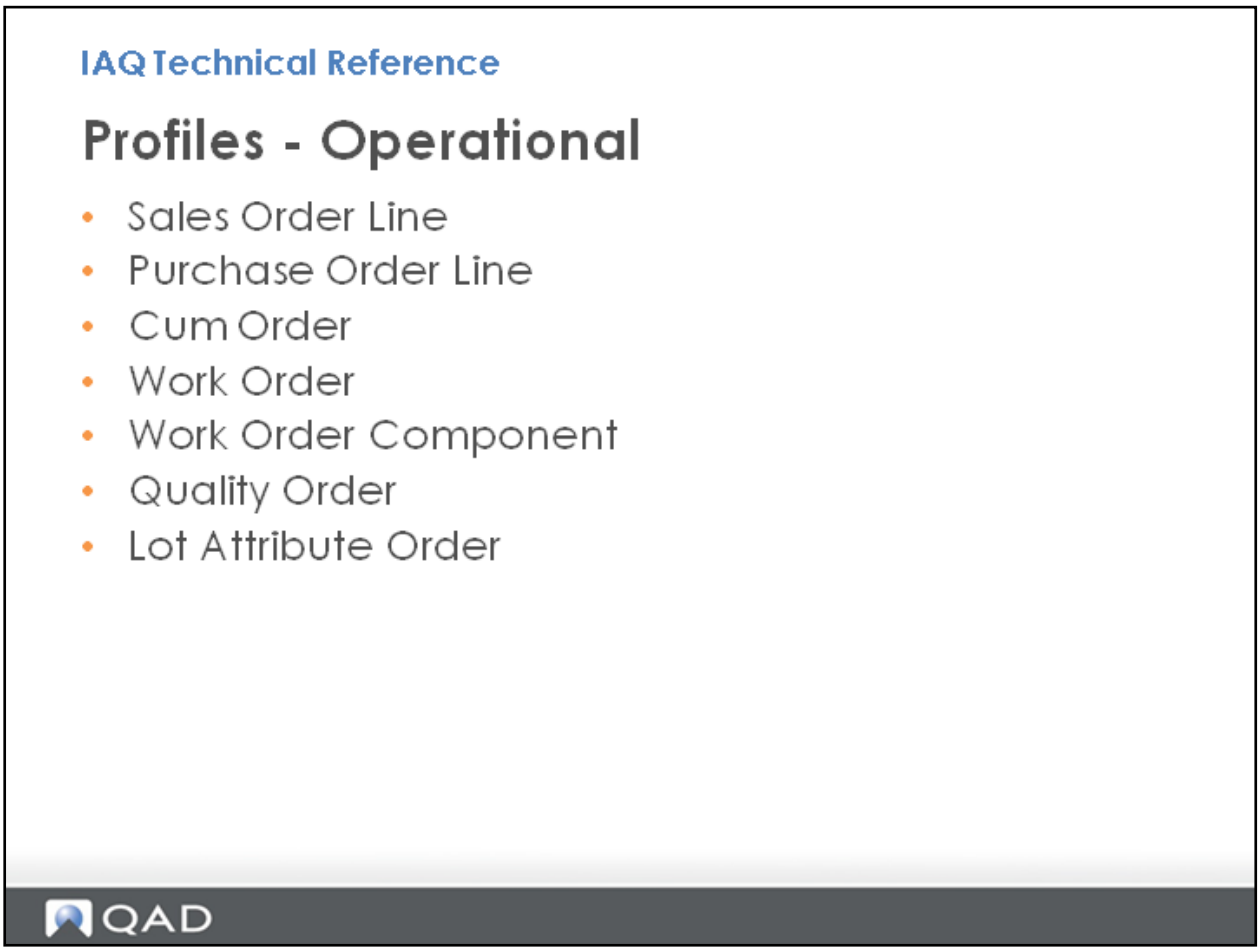


Color-coating shows the source of the specification

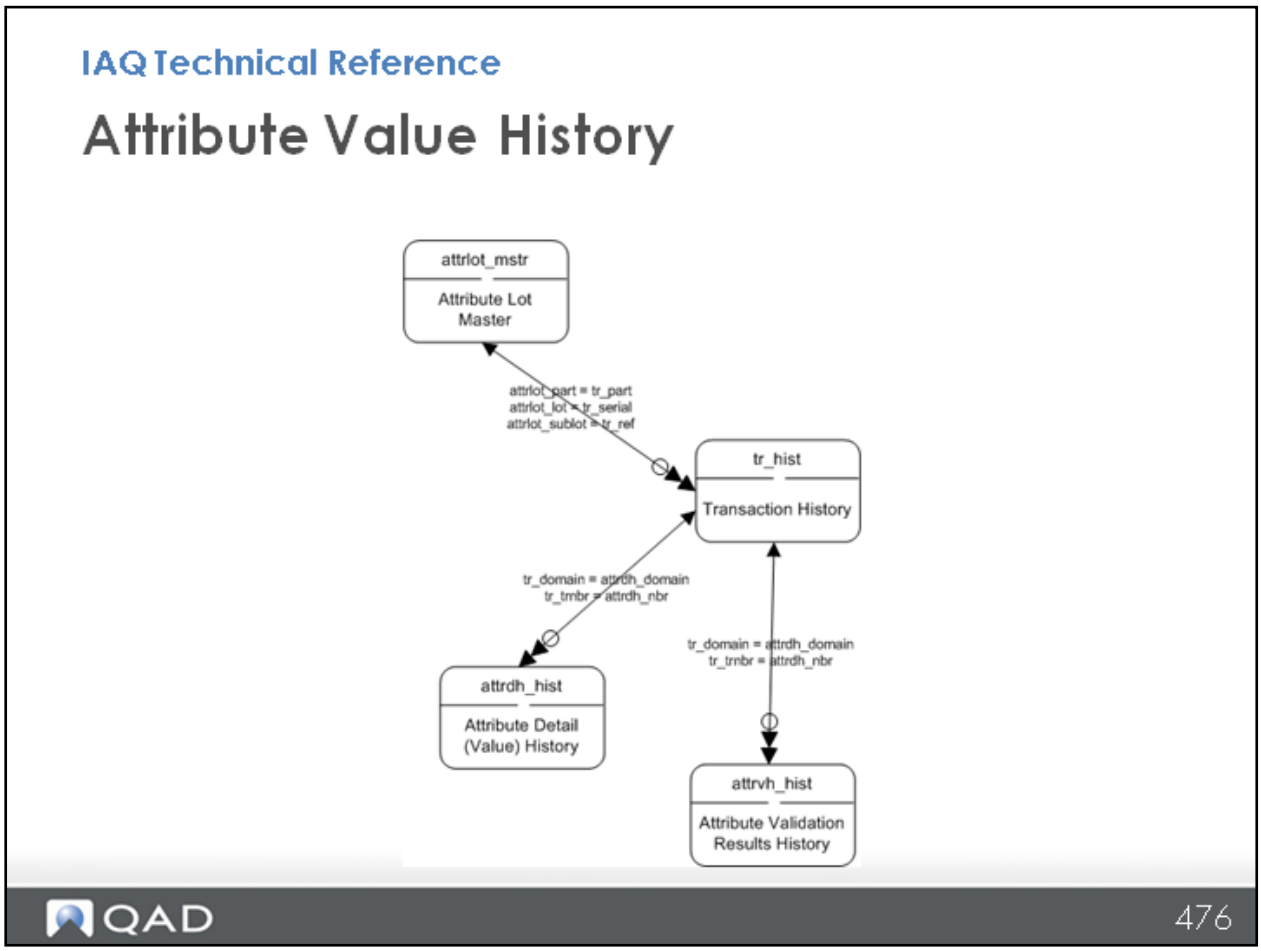
Profiles - Setup



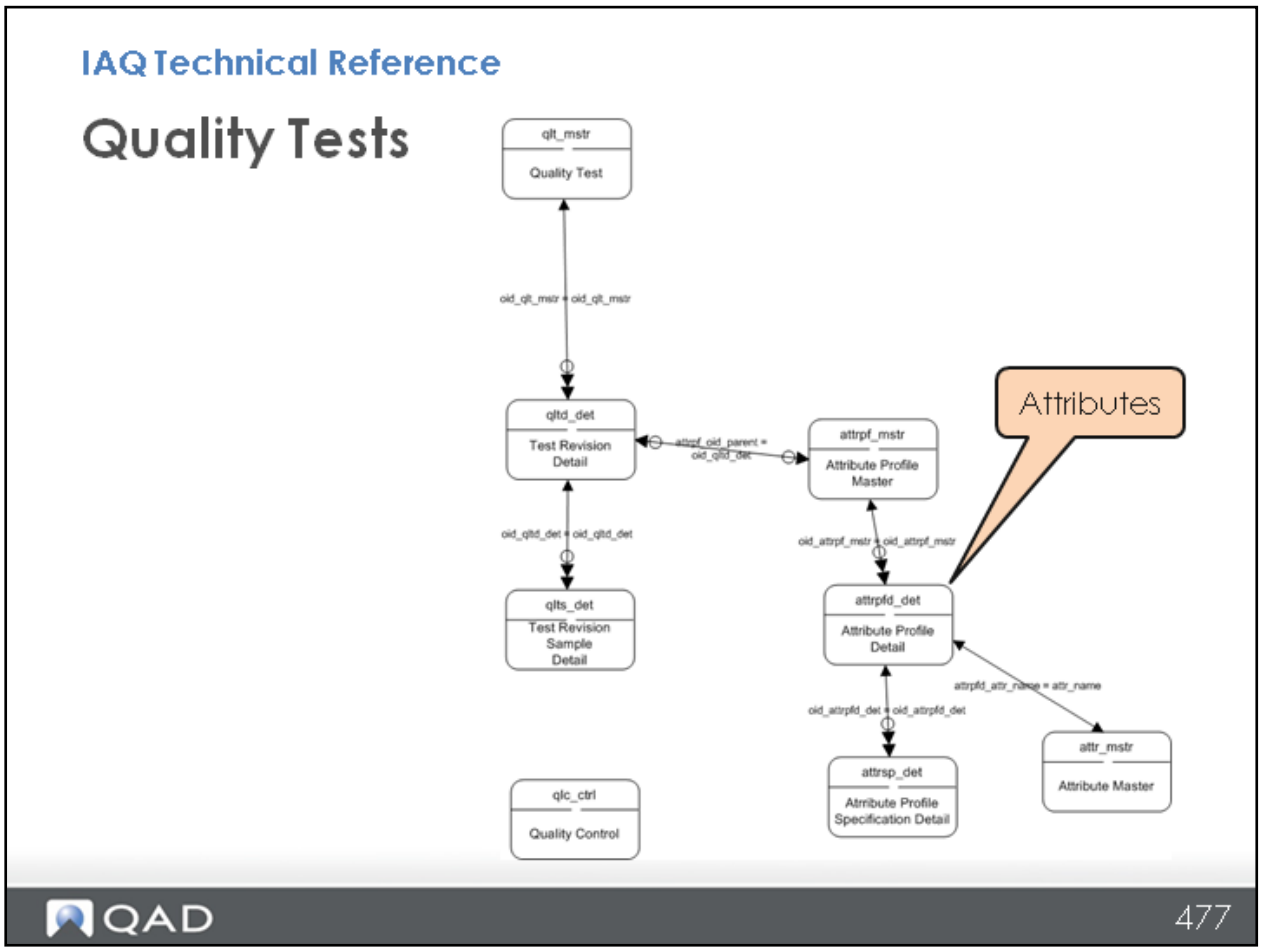
Profiles - Operational



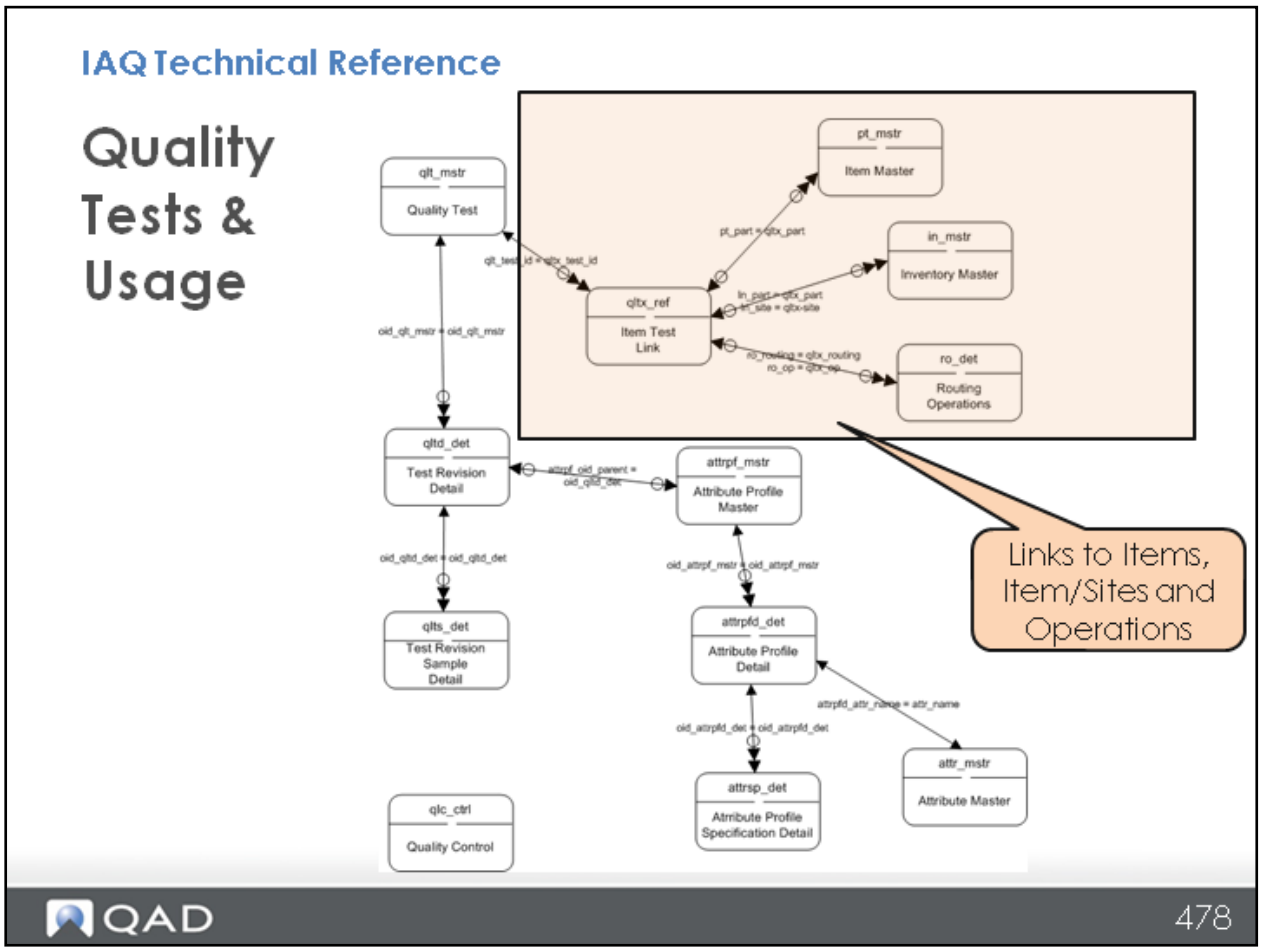
Attribute Value History



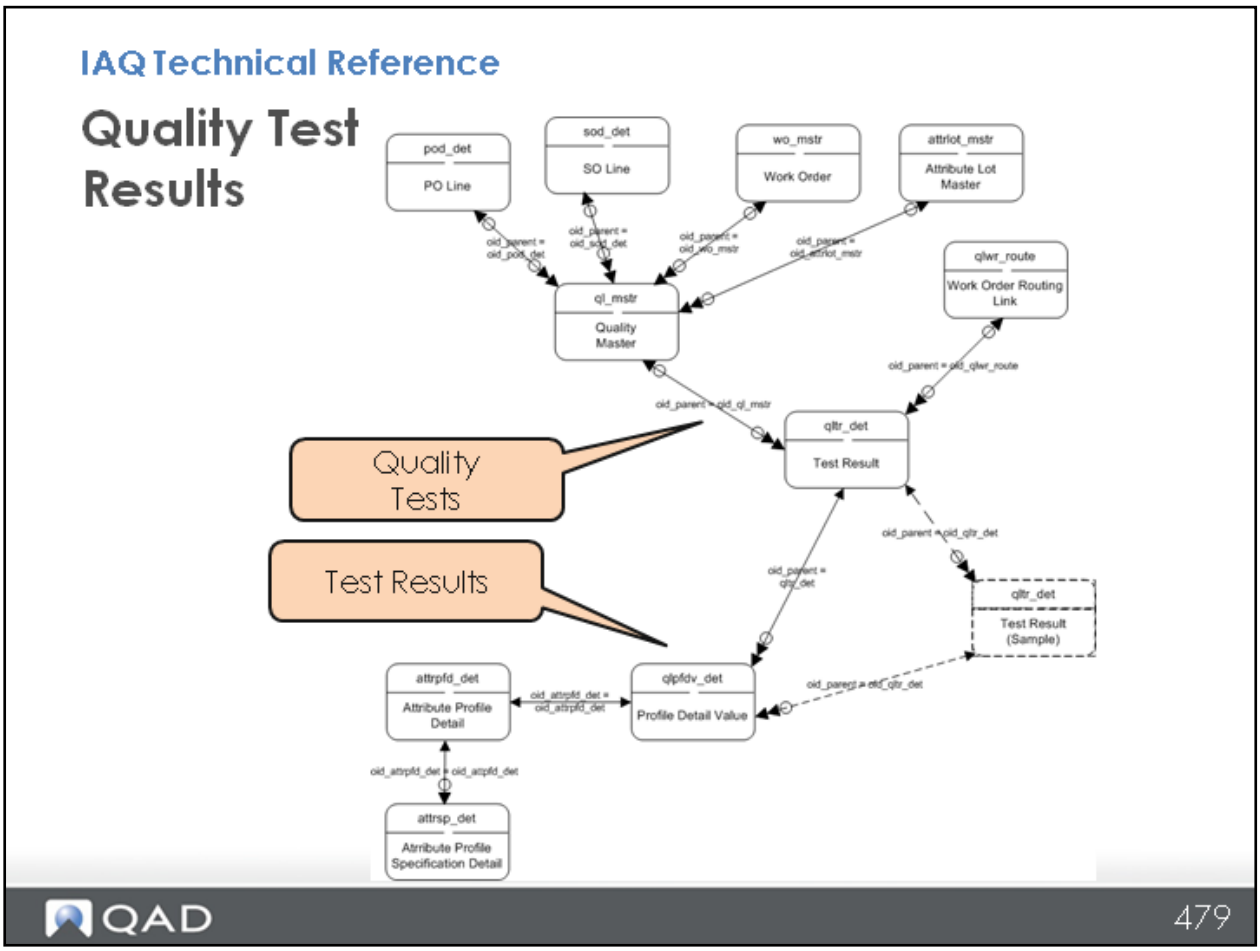
Quality Tests



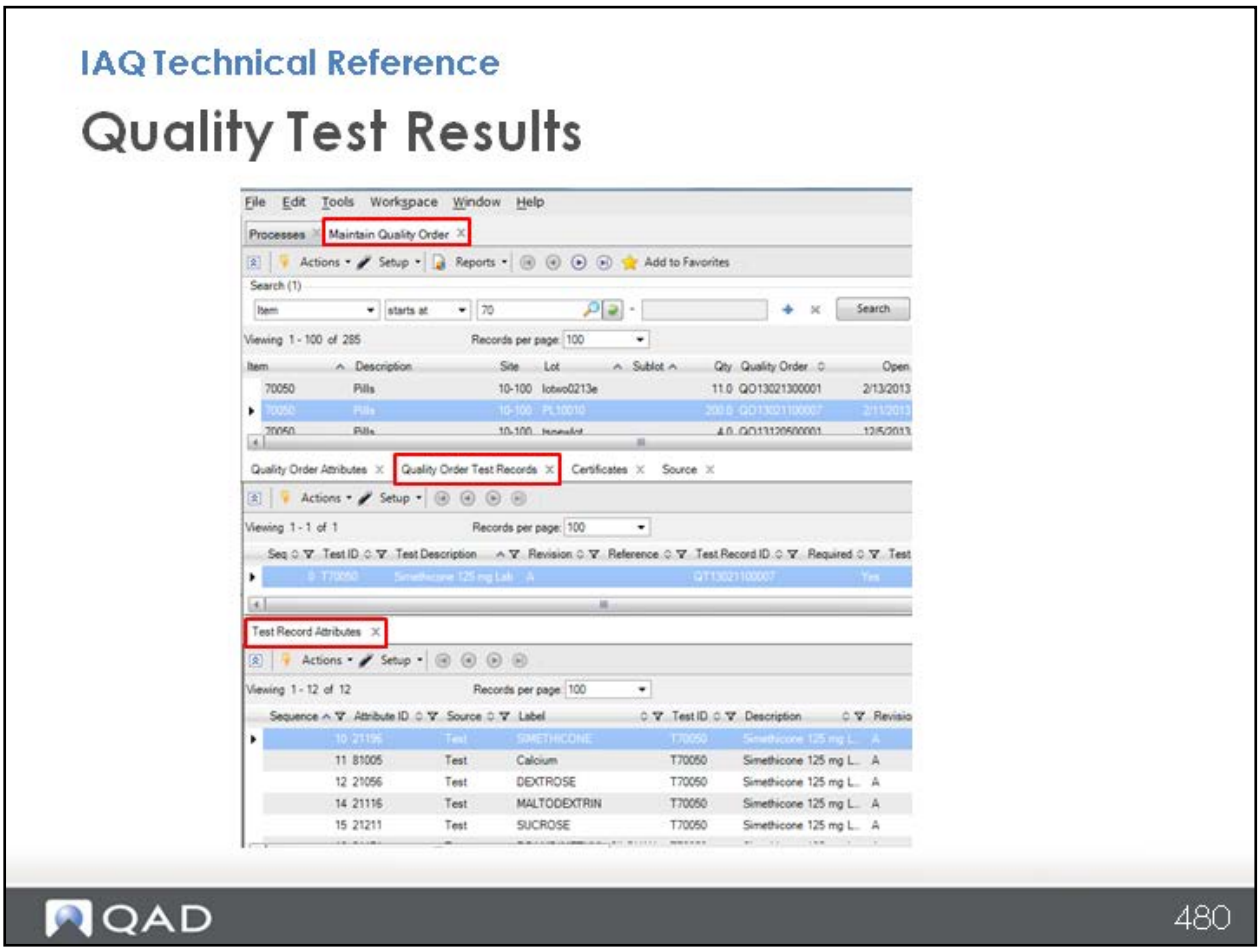
Quality Tests & Usage



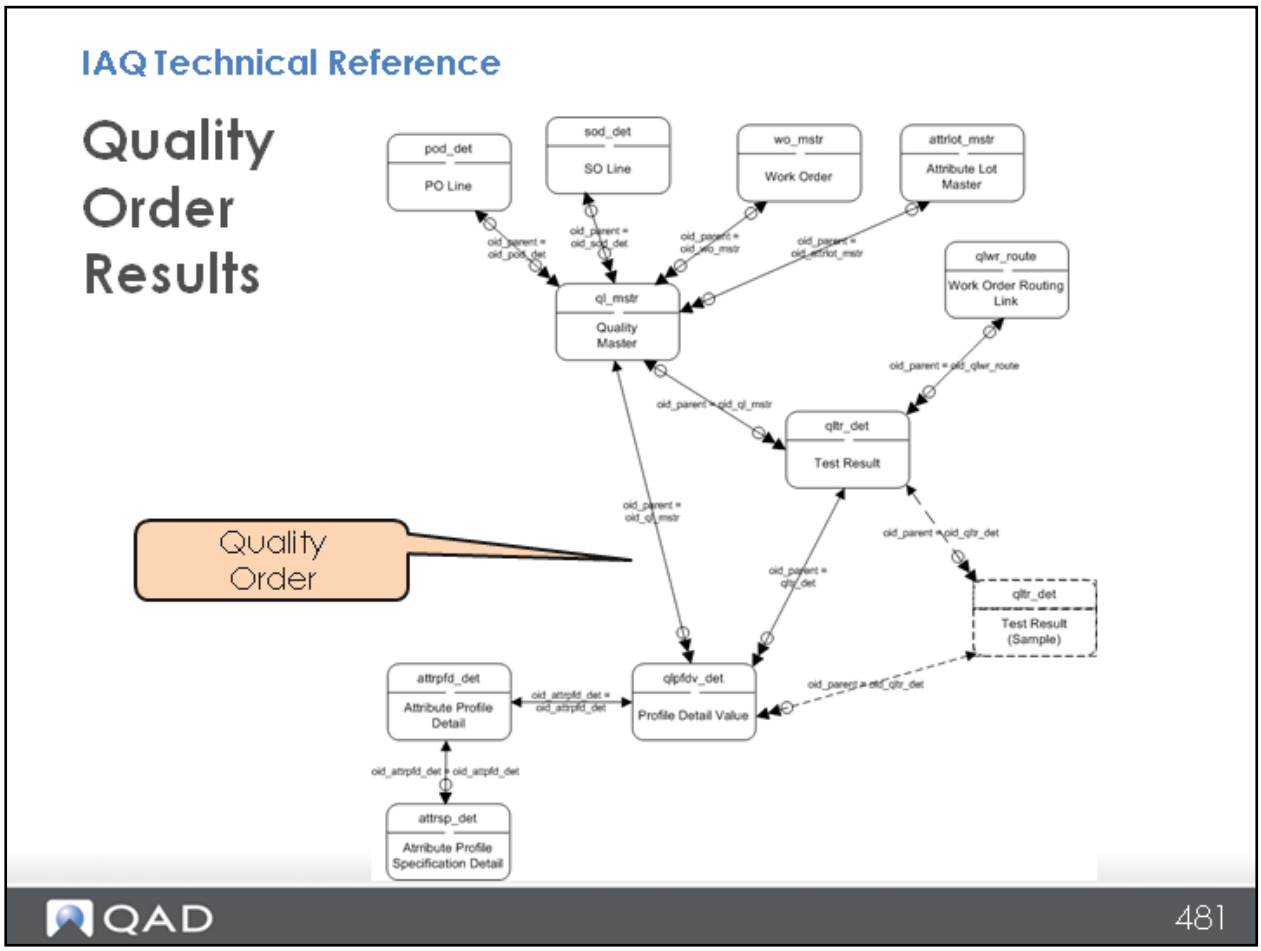
Quality Test Results



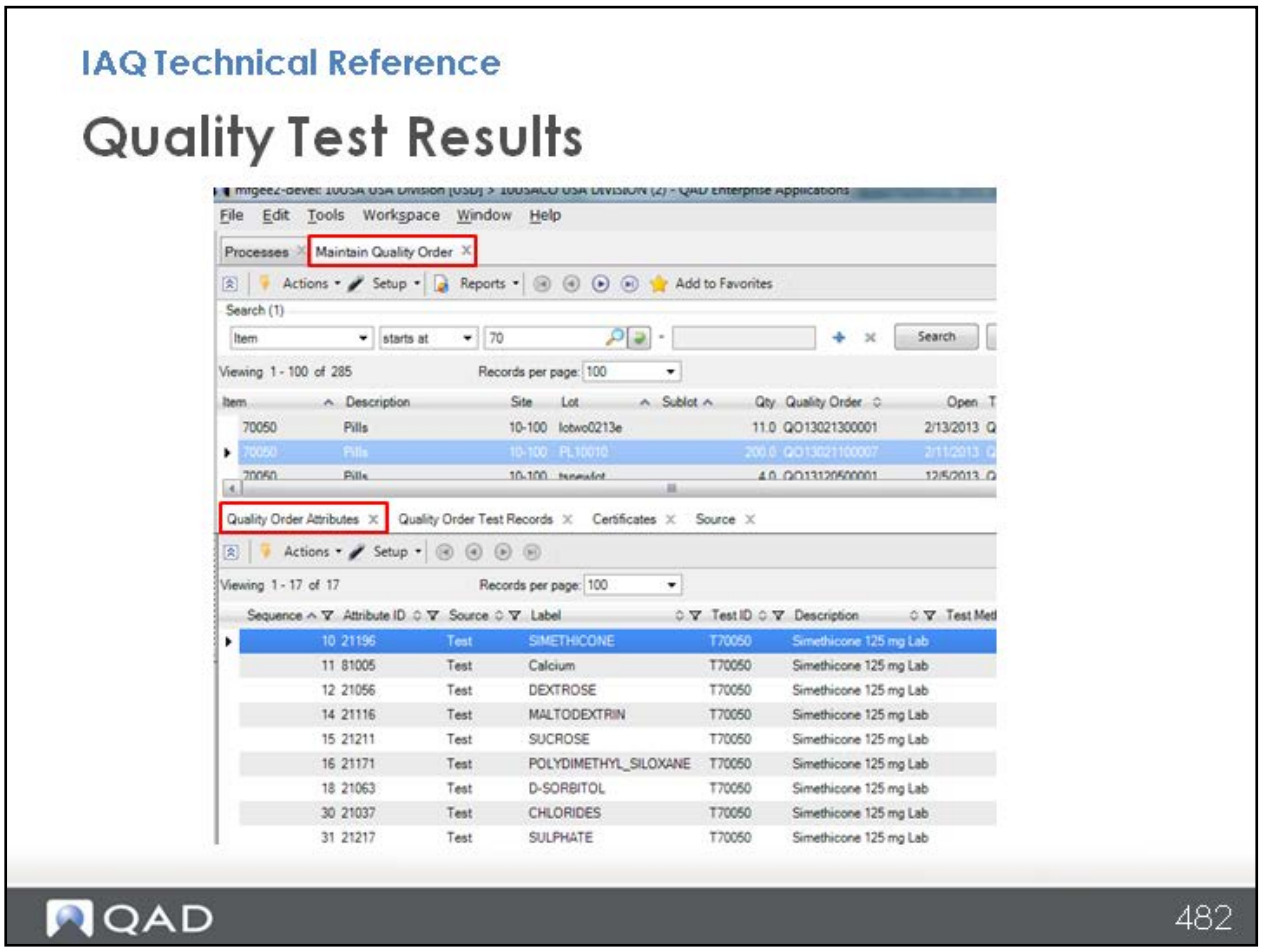
Quality Test Results



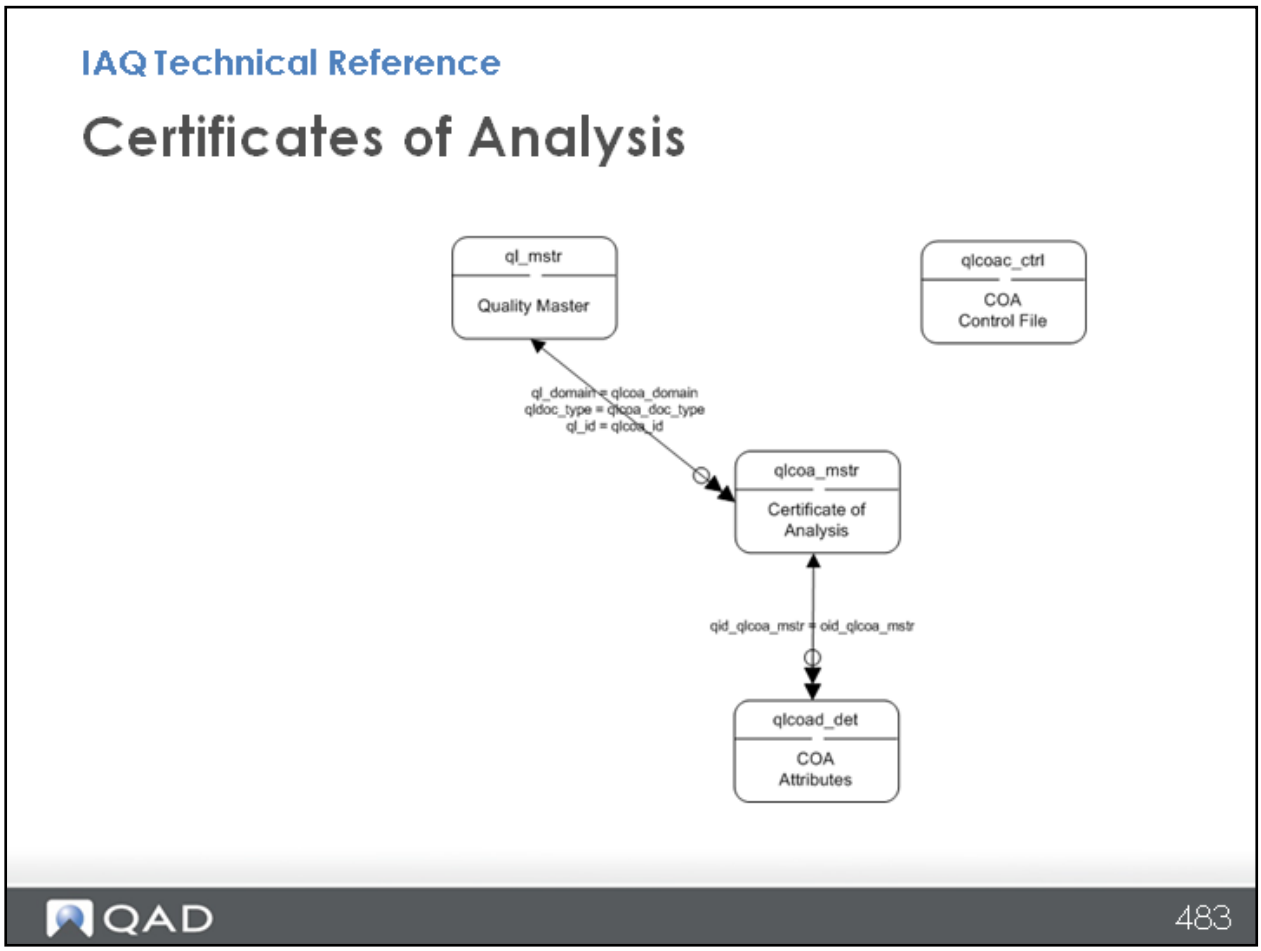
Quality Order Results



Quality Test Results

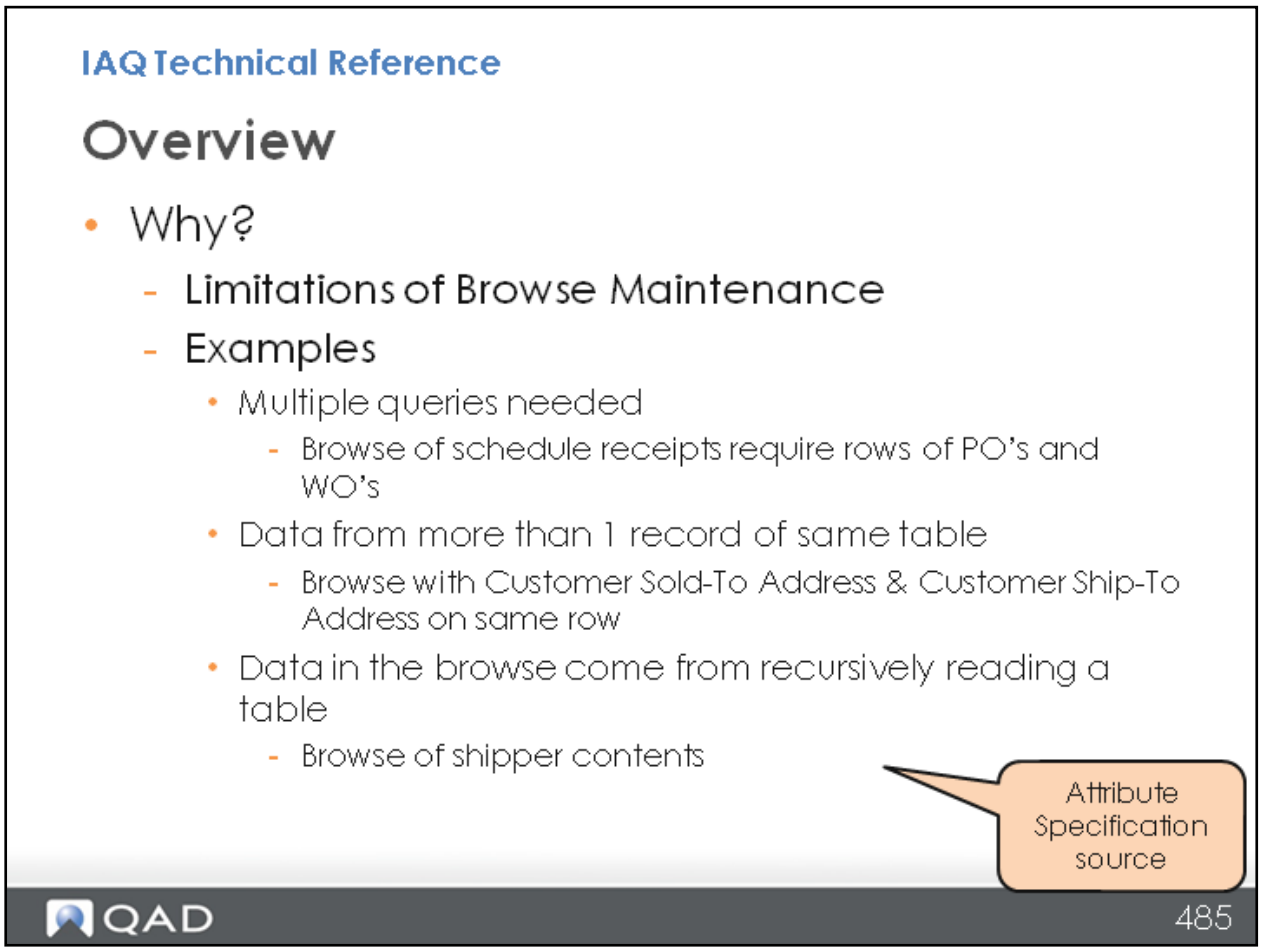


Certificates of Analysis

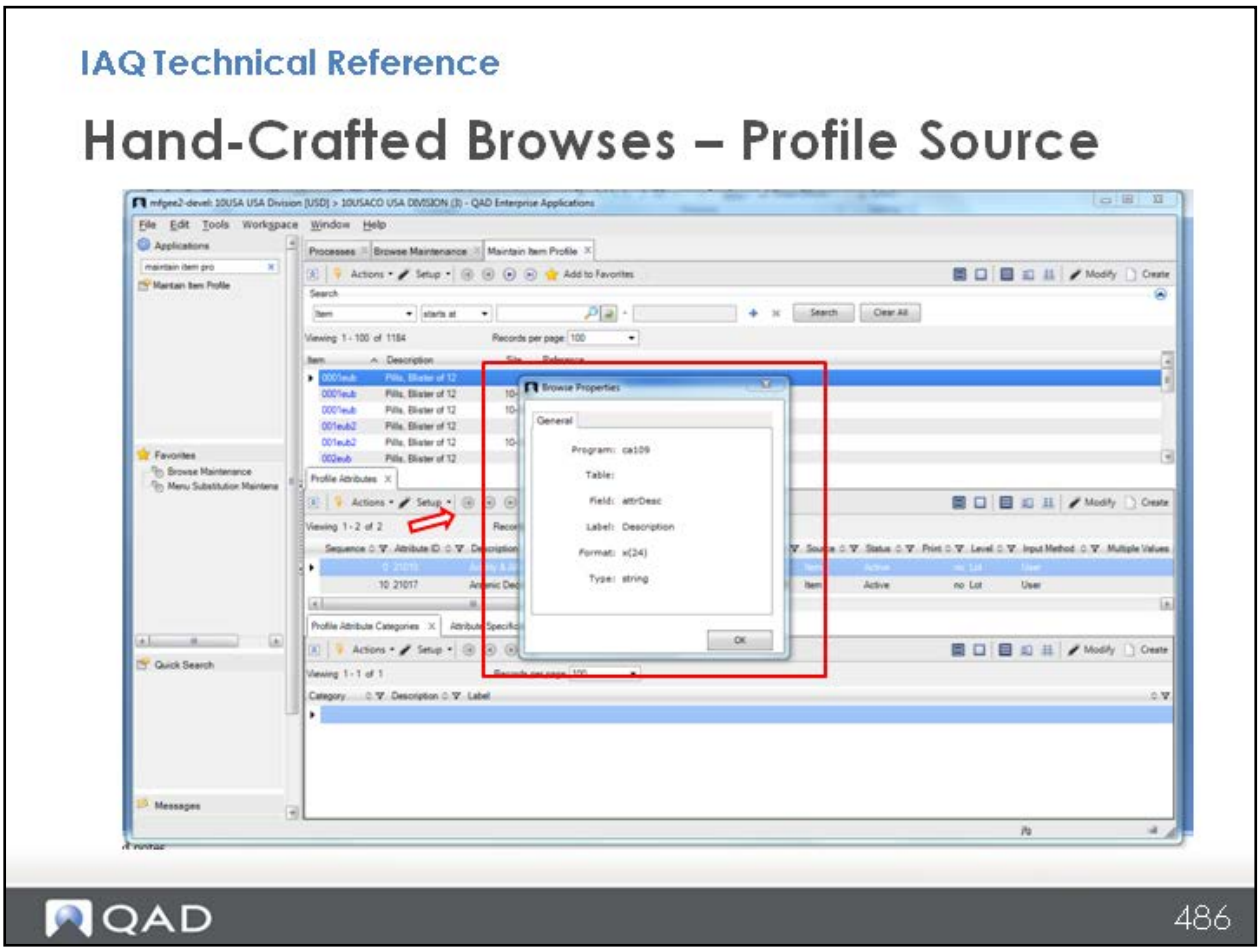


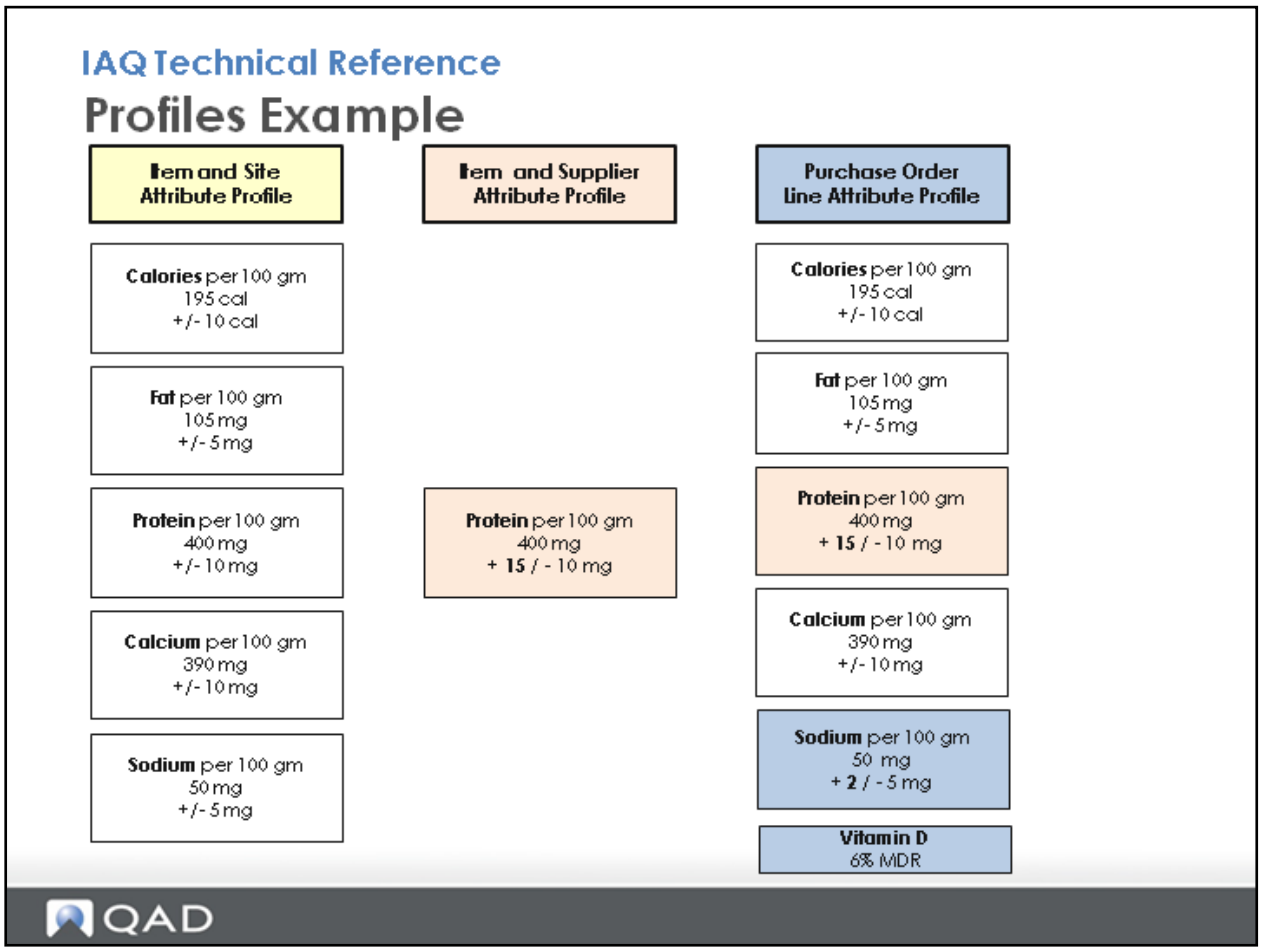
Hand-Crafted Browses

Overview


IAQ Technical Reference
Overview
Why?
Limitations of Browse Maintenance
Examples
Multiple queries needed
Browse of schedule receipts require rows of PO's and WO's
Data from more than 1 record of same table
Browse with Customer Sold-To Address & Customer Ship-To Address on same row
Data in the browse come from recursively reading a table
Browse of shipper contents
Attribute Specification source
QAD
485

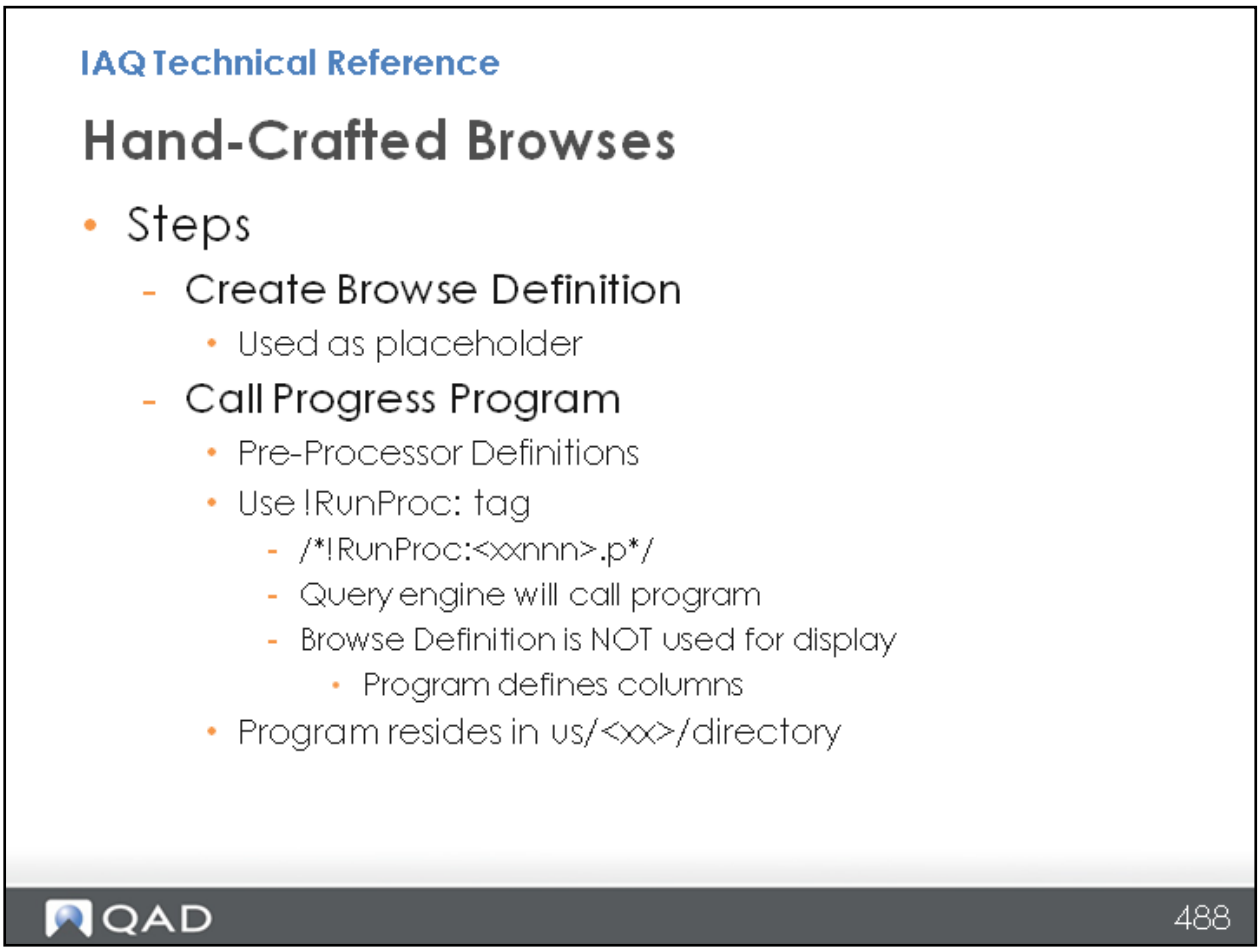
Hand-Crafted Browses – Profile Source



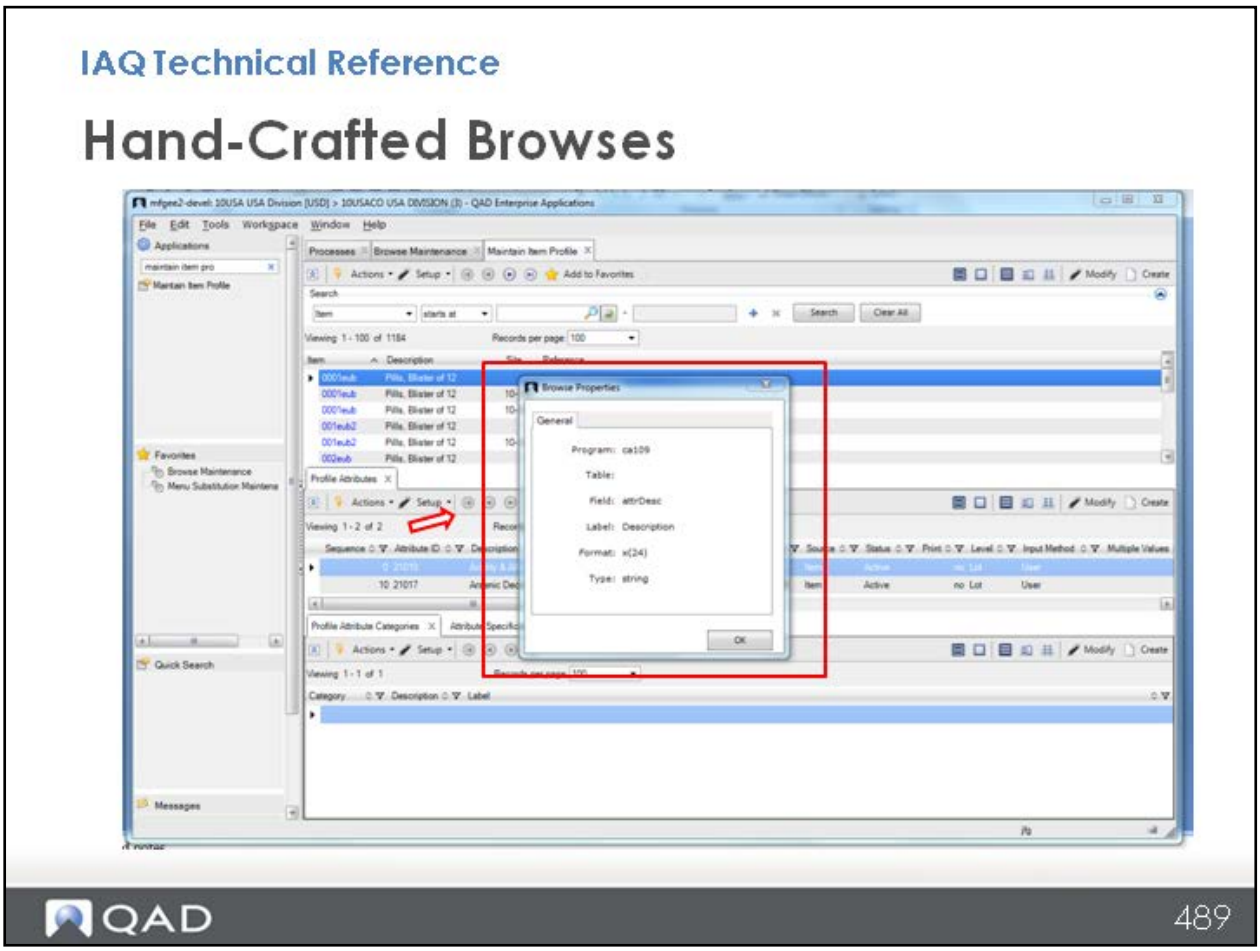


Color-coating shows the source of the specification

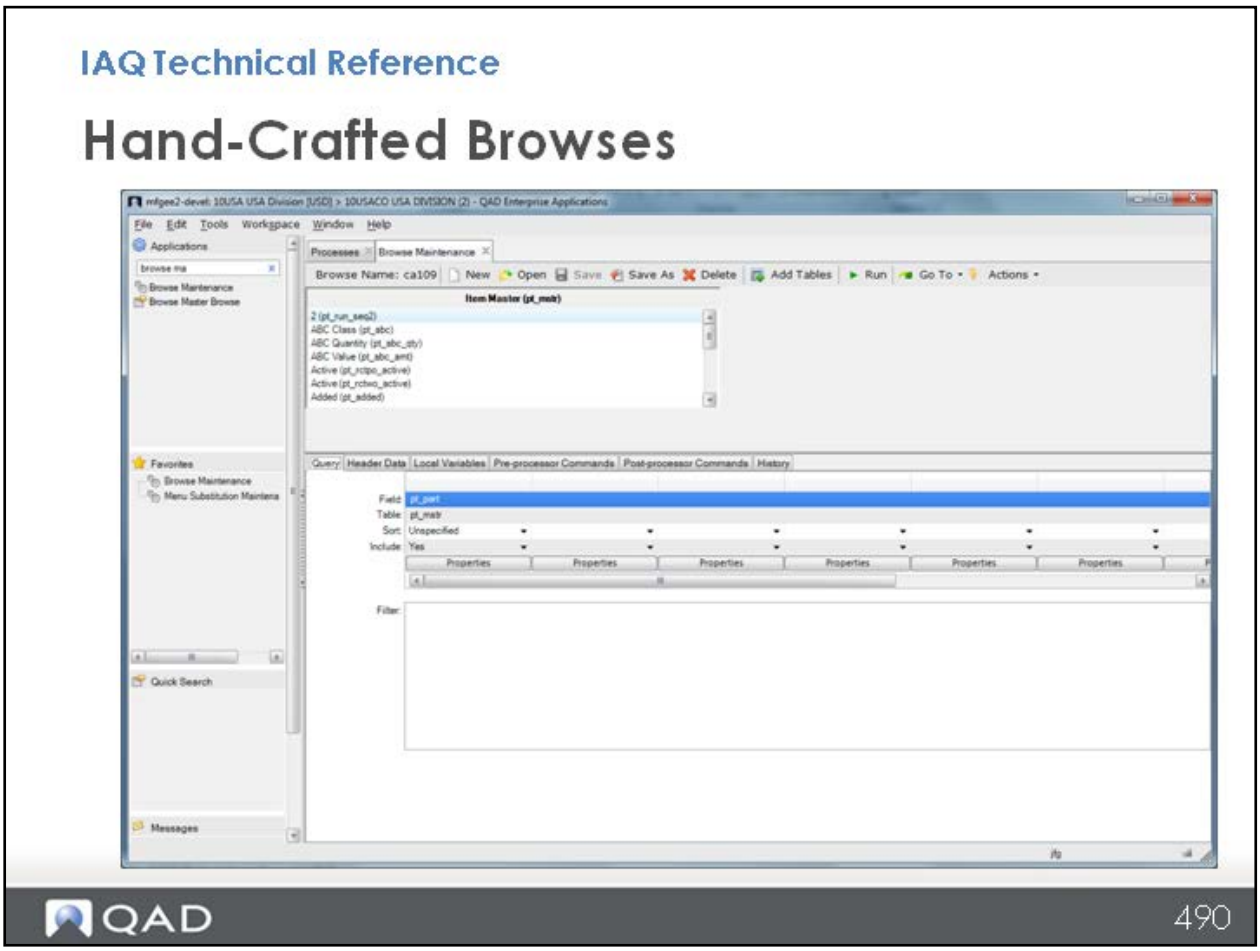
Hand-Crafted Browses



Hand-Crafted Browses



Hand-Crafted Browses



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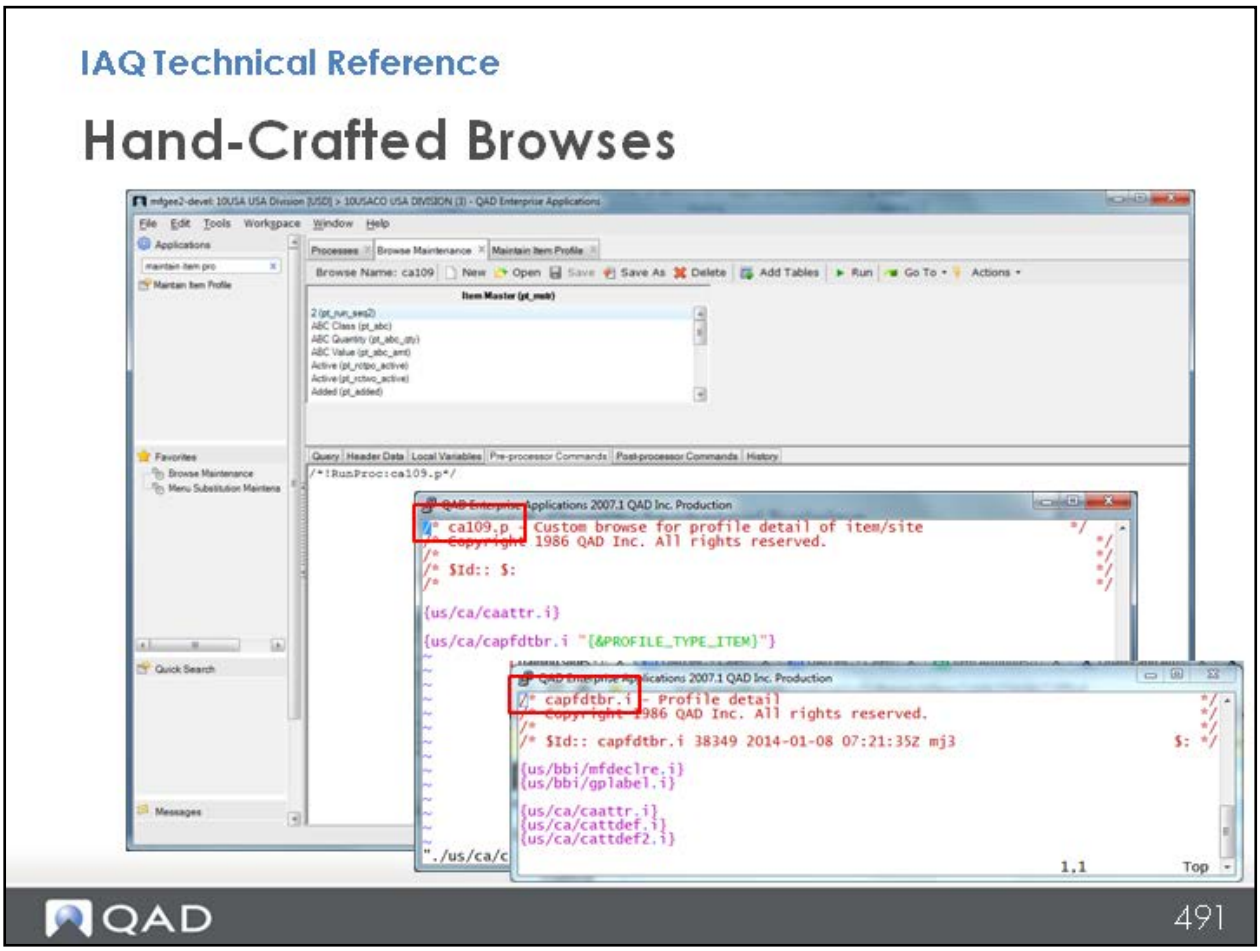

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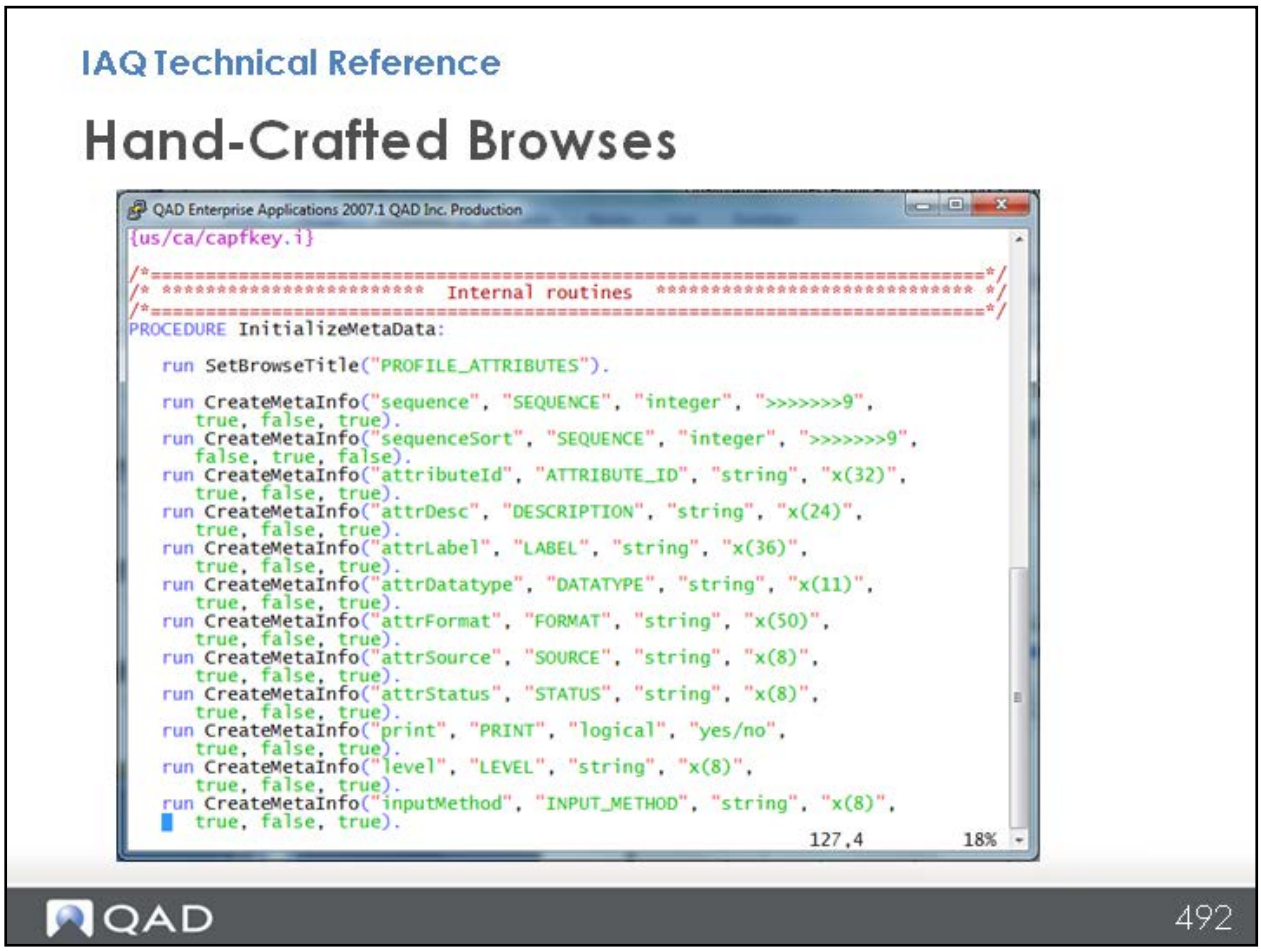
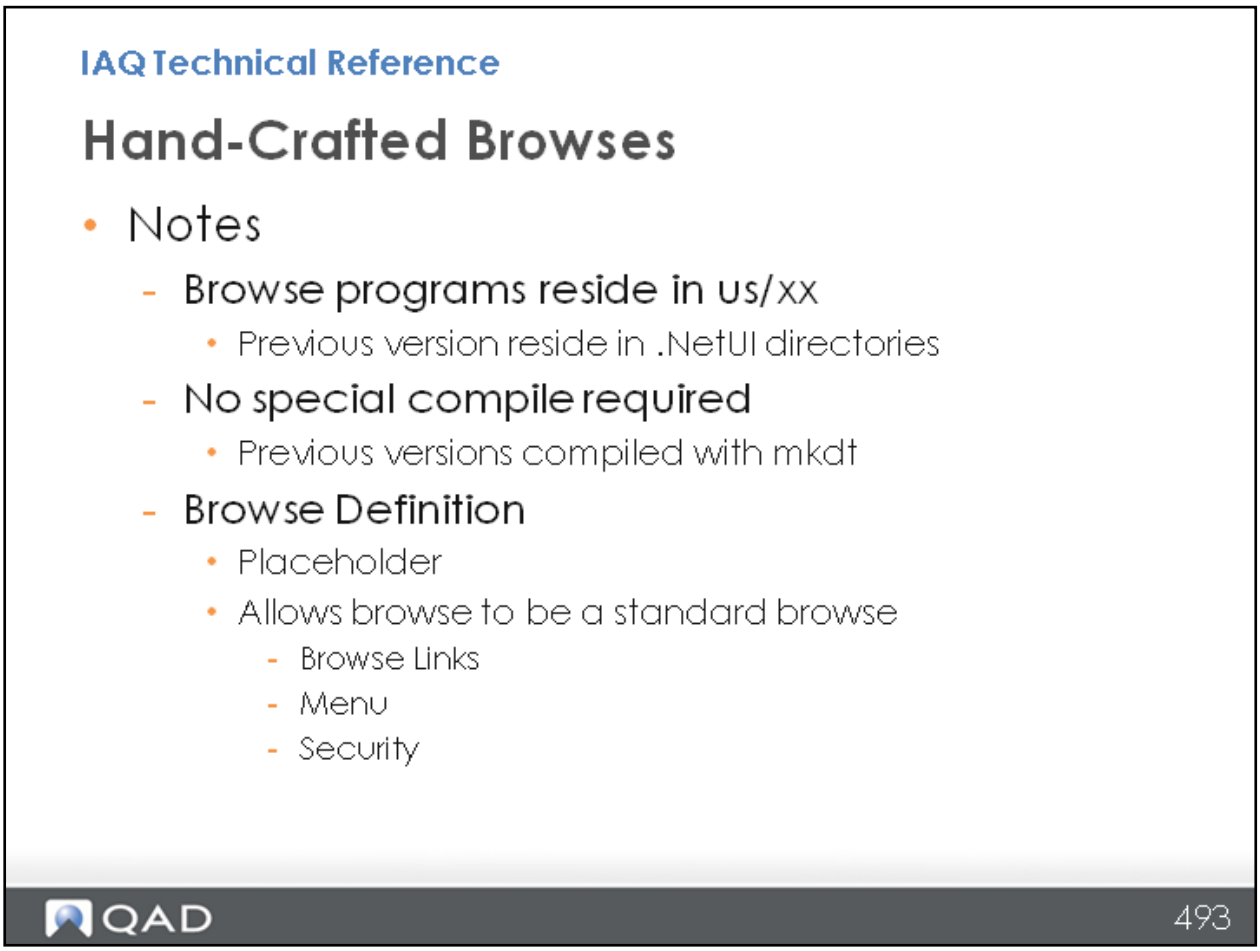
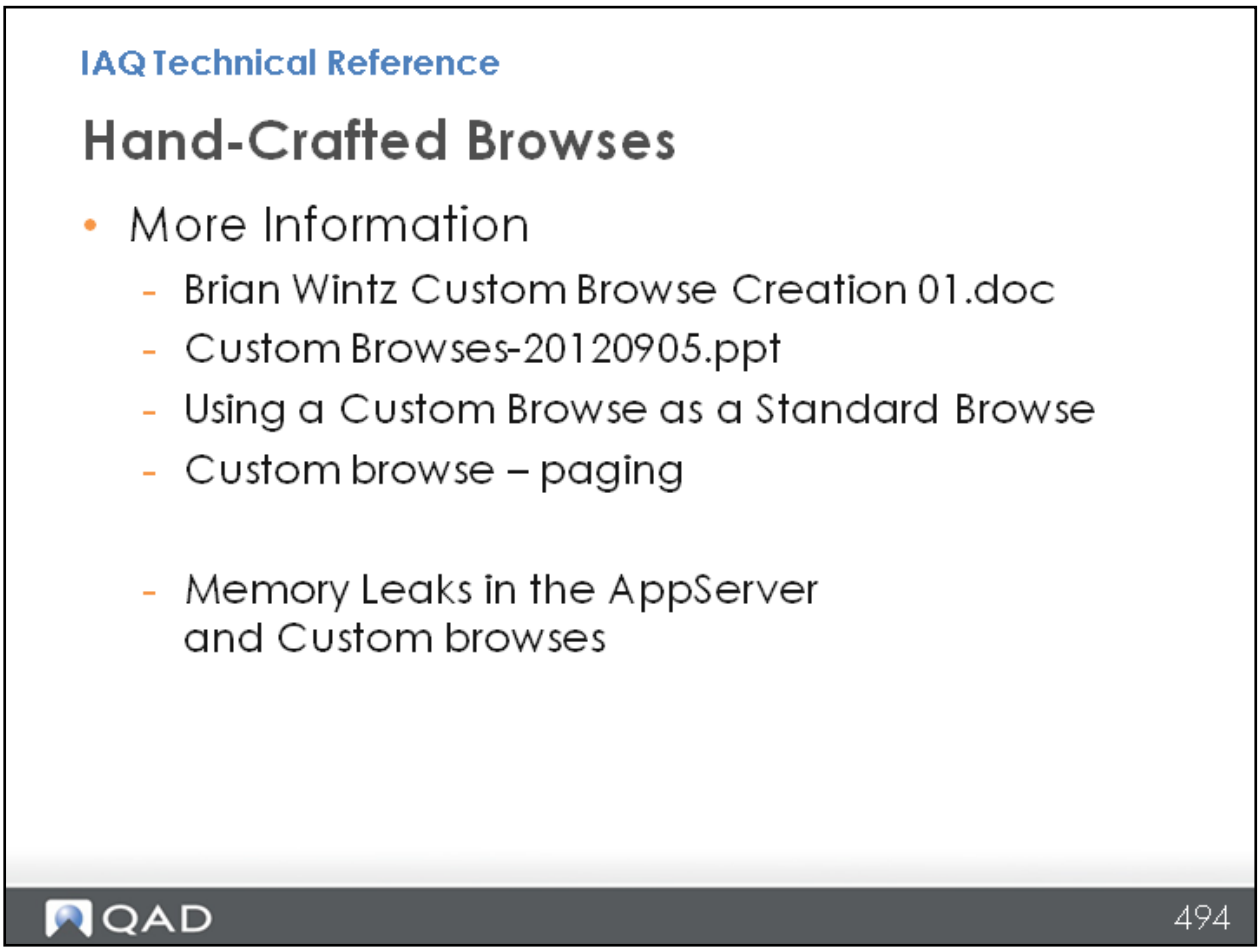


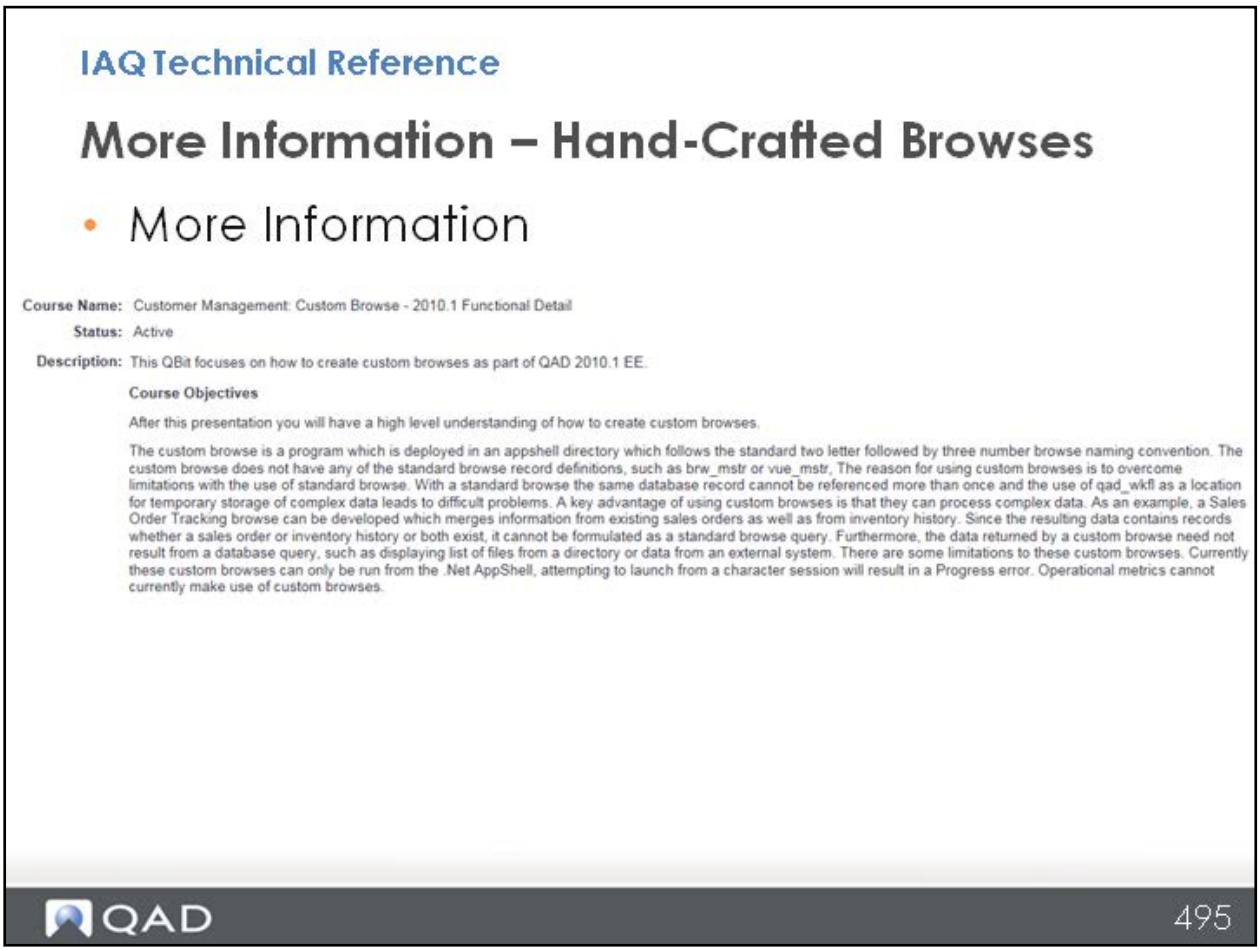
Hand-Crafted Browses



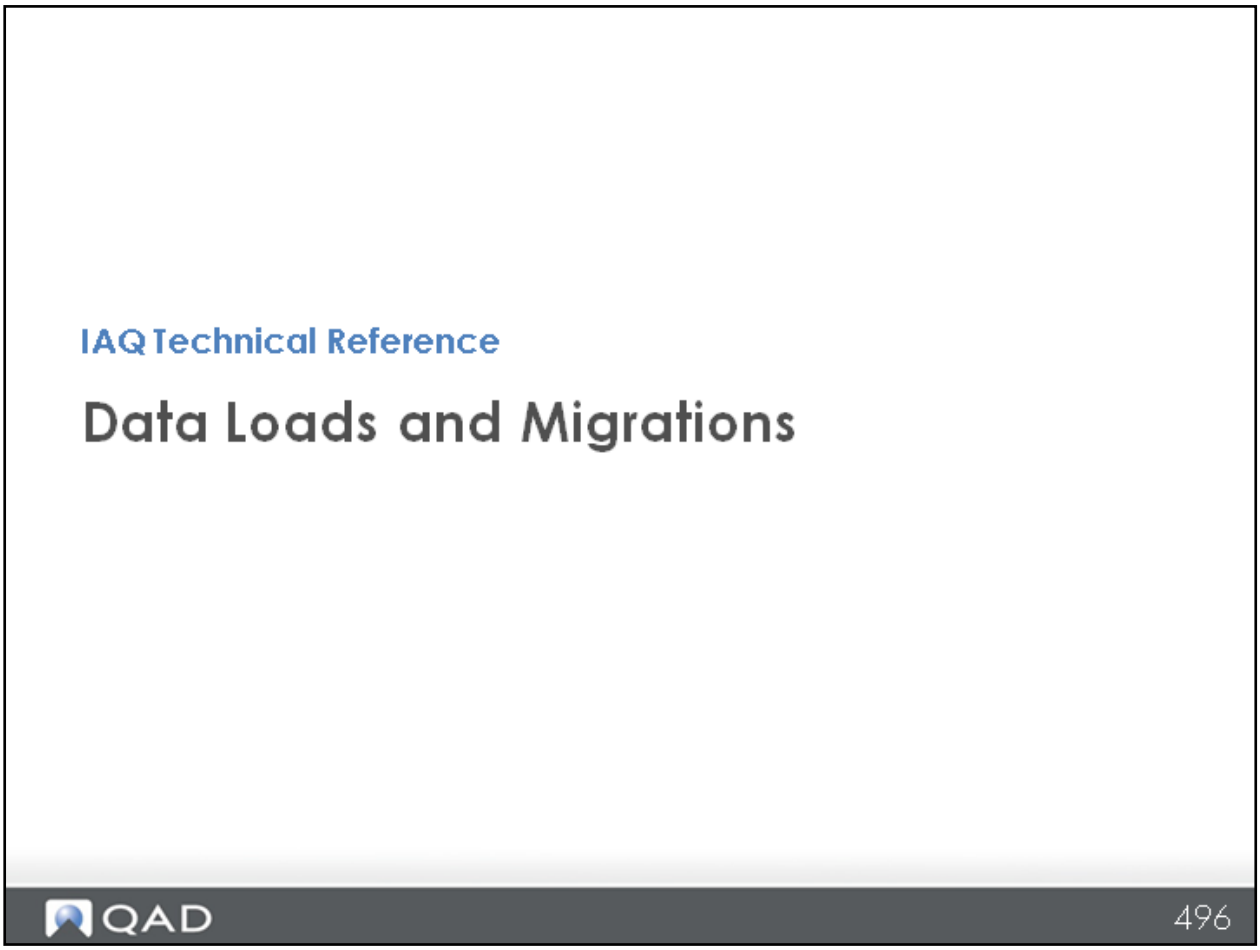
Hand-Crafted Browses



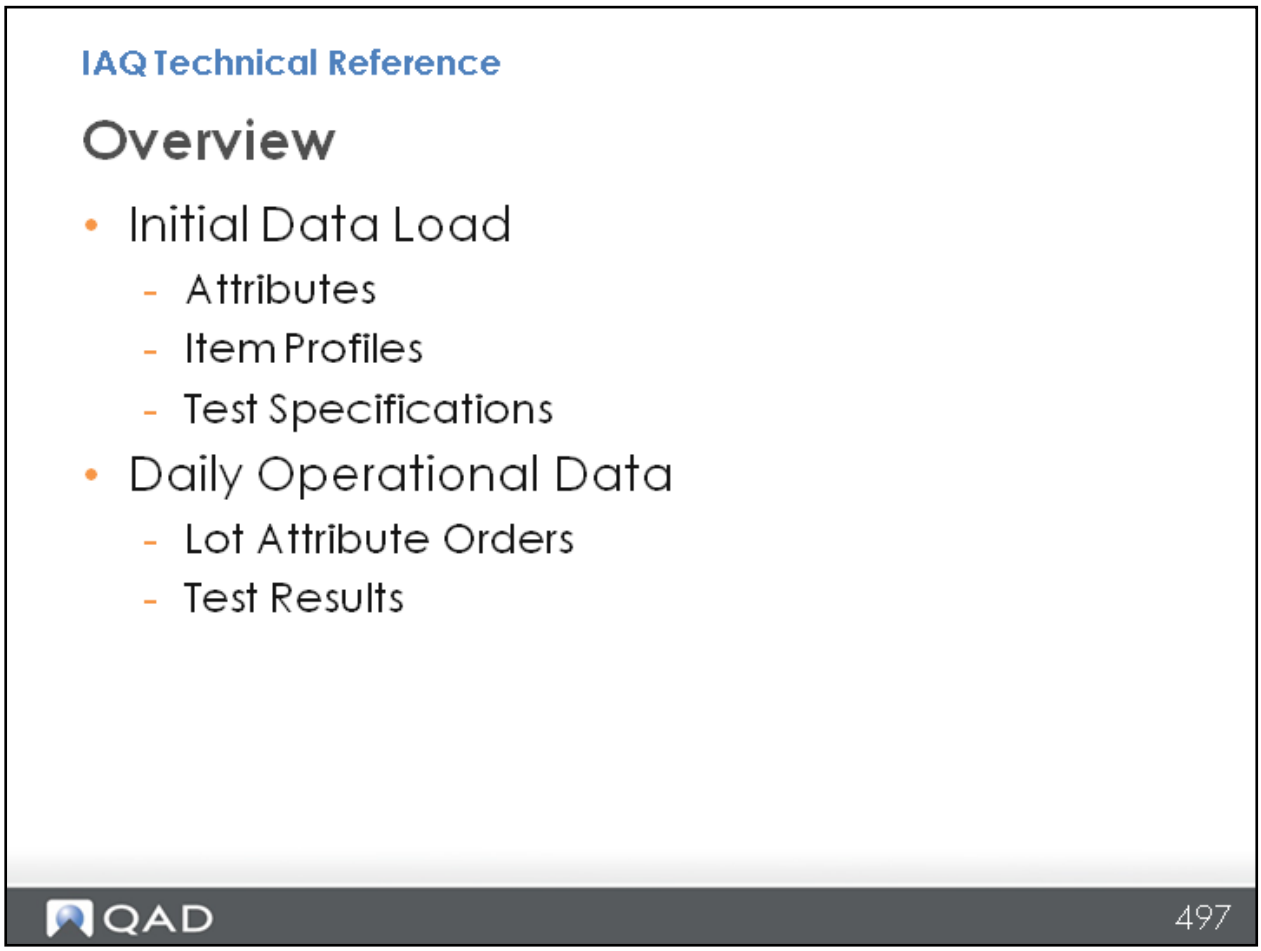
More Information – Hand-Crafted Browses



Data Loads and Migrations



Overview


IAQ Technical Reference
Overview
Initial Data Load
Attributes
Item Profiles
Test Specifications
Daily Operational Data
Lot Attribute Orders
Test Results
QAD
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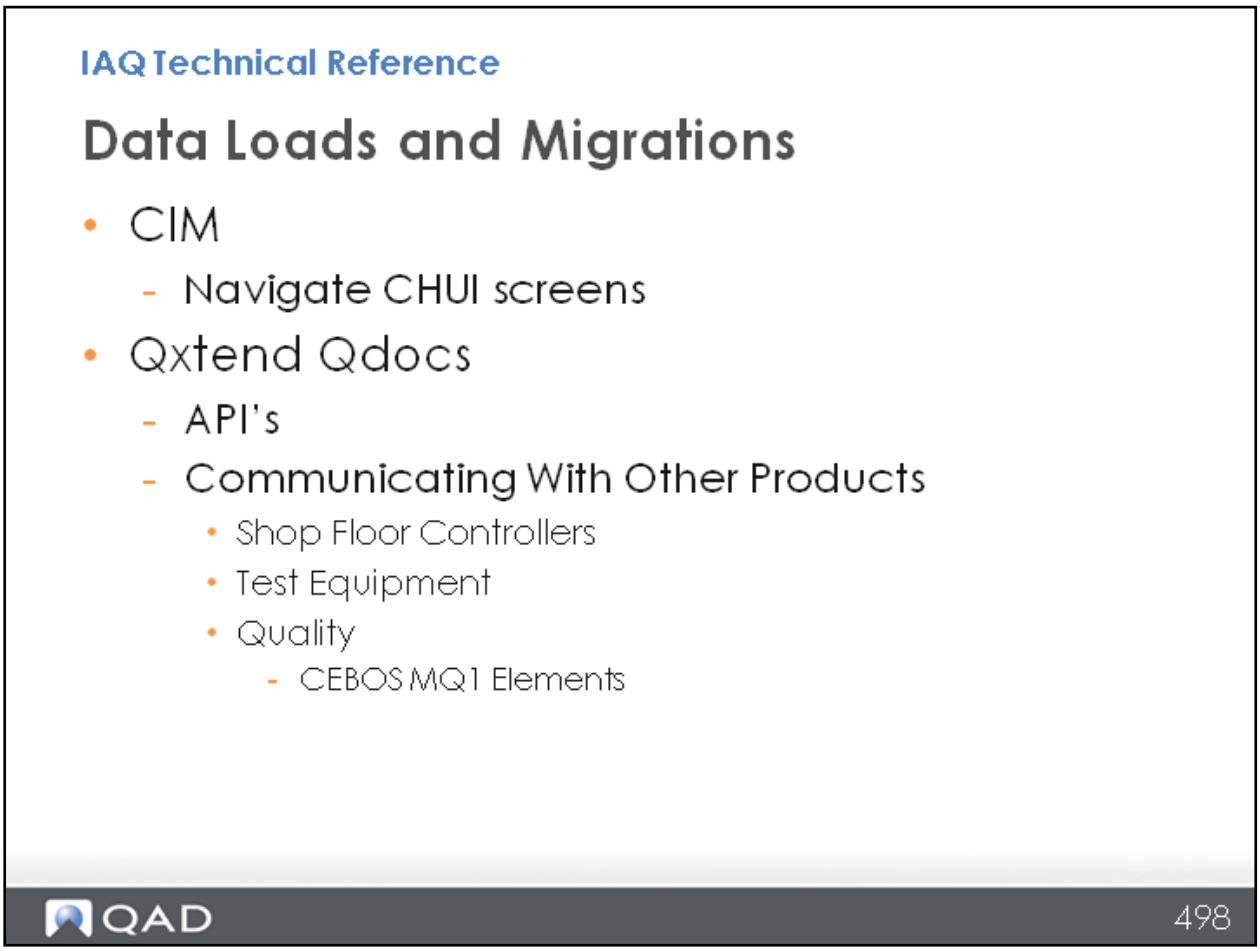
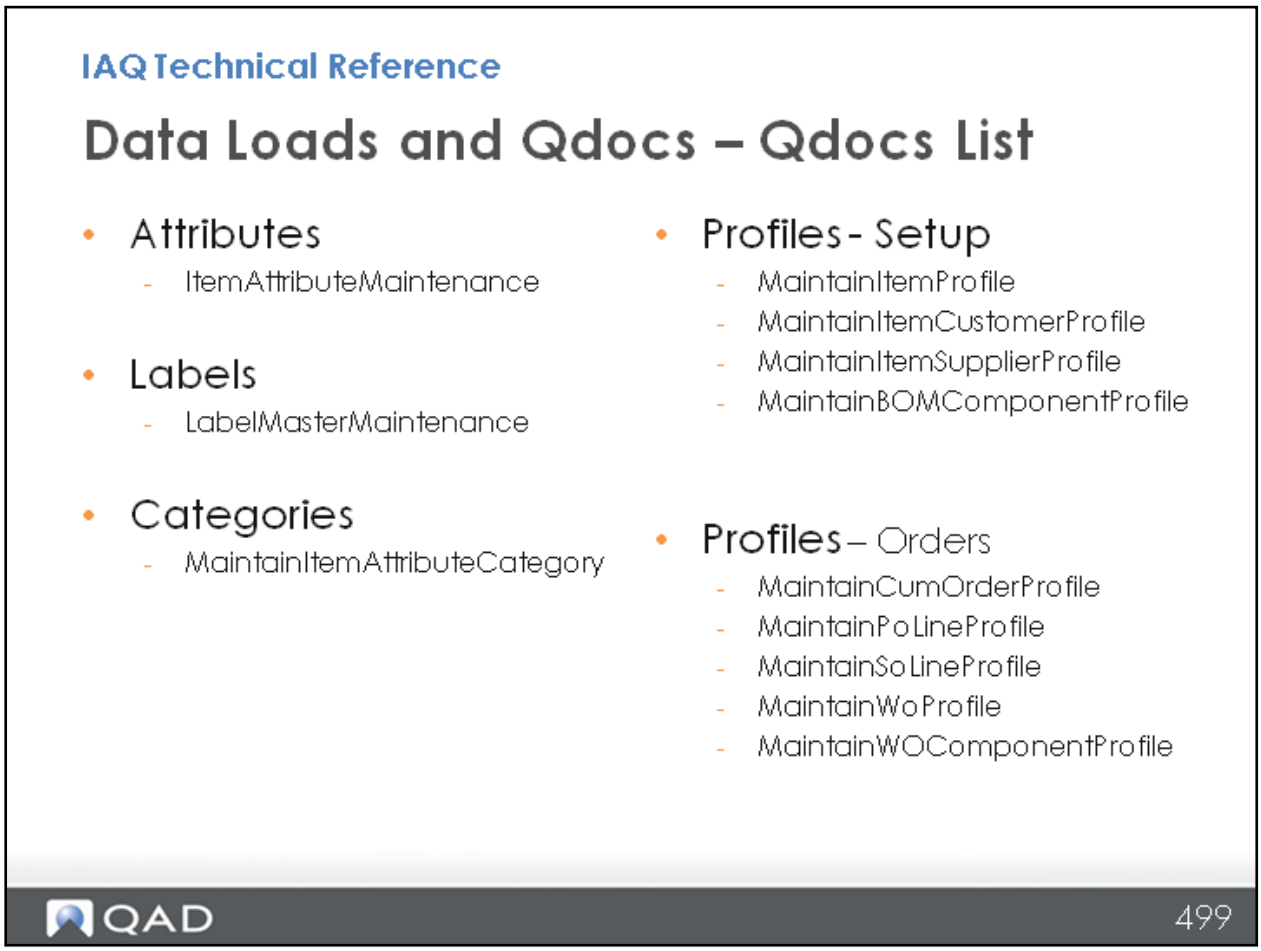
Data Loads and Migrations



Data Loads and Qdocs – Qdocs List



The directory where the QXtend inbound schemas reside is under the tomcat directory .../qxi/WEB-INF/schemas/QADEE/custom

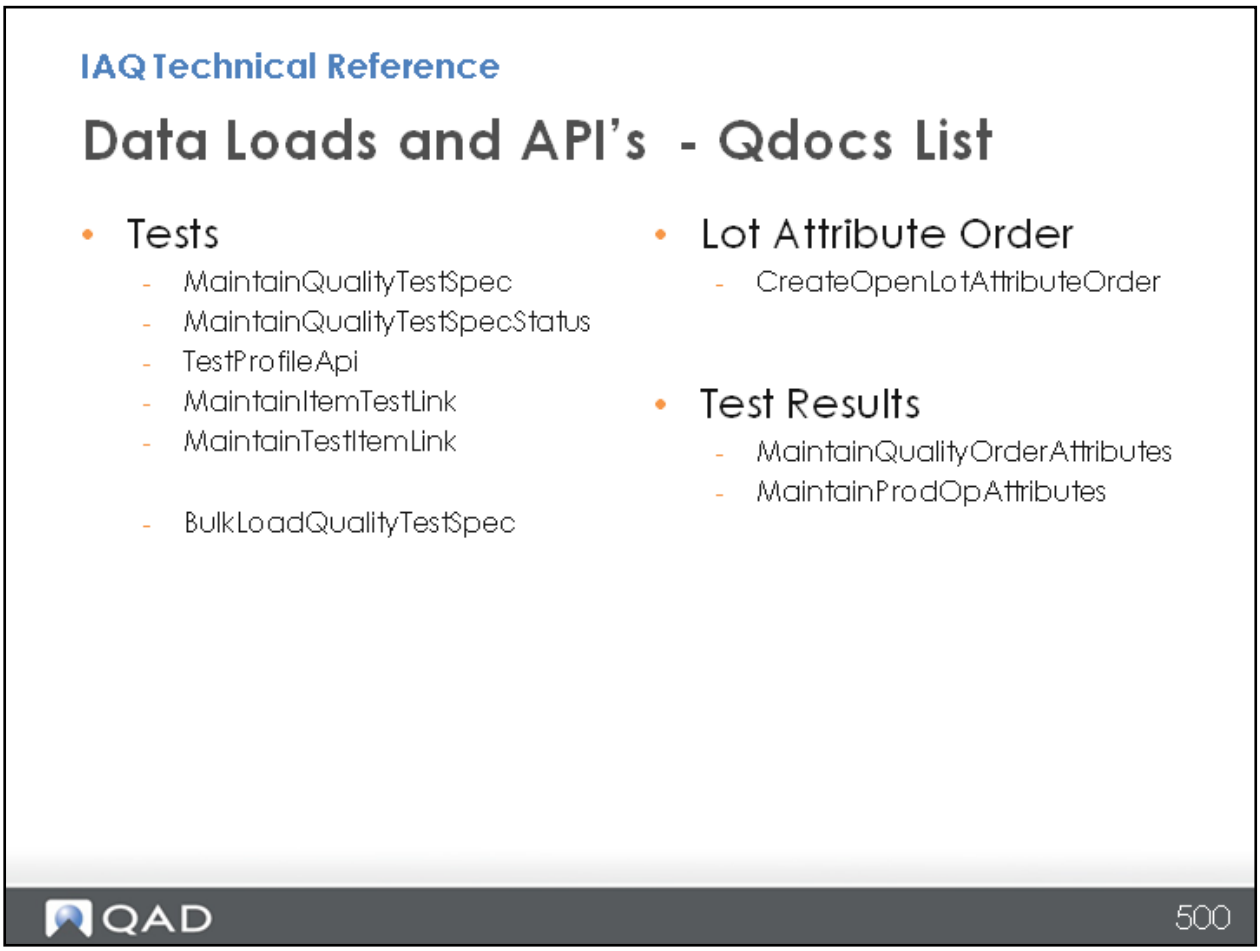
In our R&D environments they are located in /tomcat/webapps/qxi/WEB-INF/schemas/QADEE/custom

In the QPC environments they are located in /tomcat/8090/webapps/qxi/WEB-INF/schemas/QADEE/custom

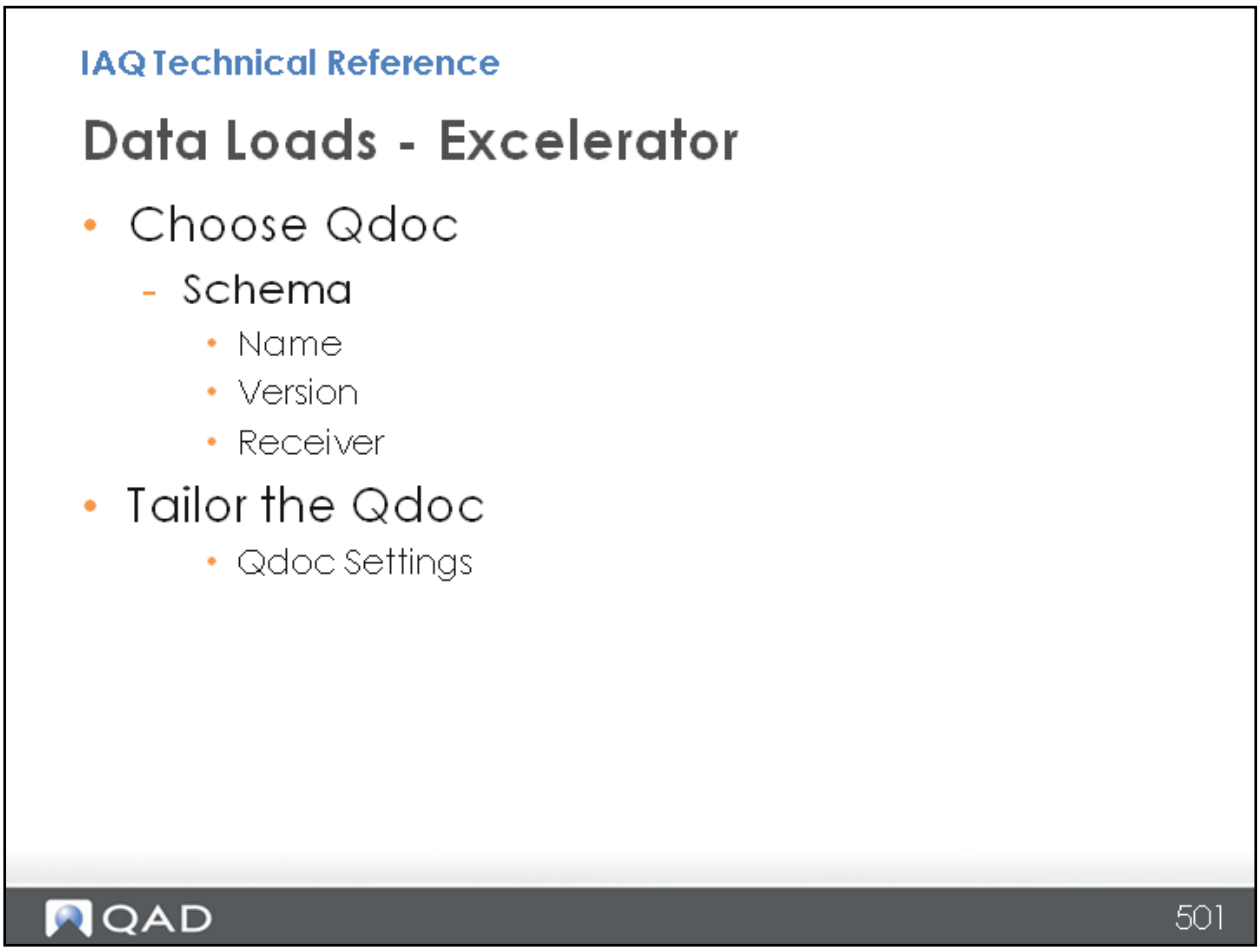
At one early adopter who had multiple environments they had separate directories for “qxitest”, “qxival”, and “qxiprod”, each having there own copy of the schemas directory.

So directory structure depends on how the customer’s installation is configured.

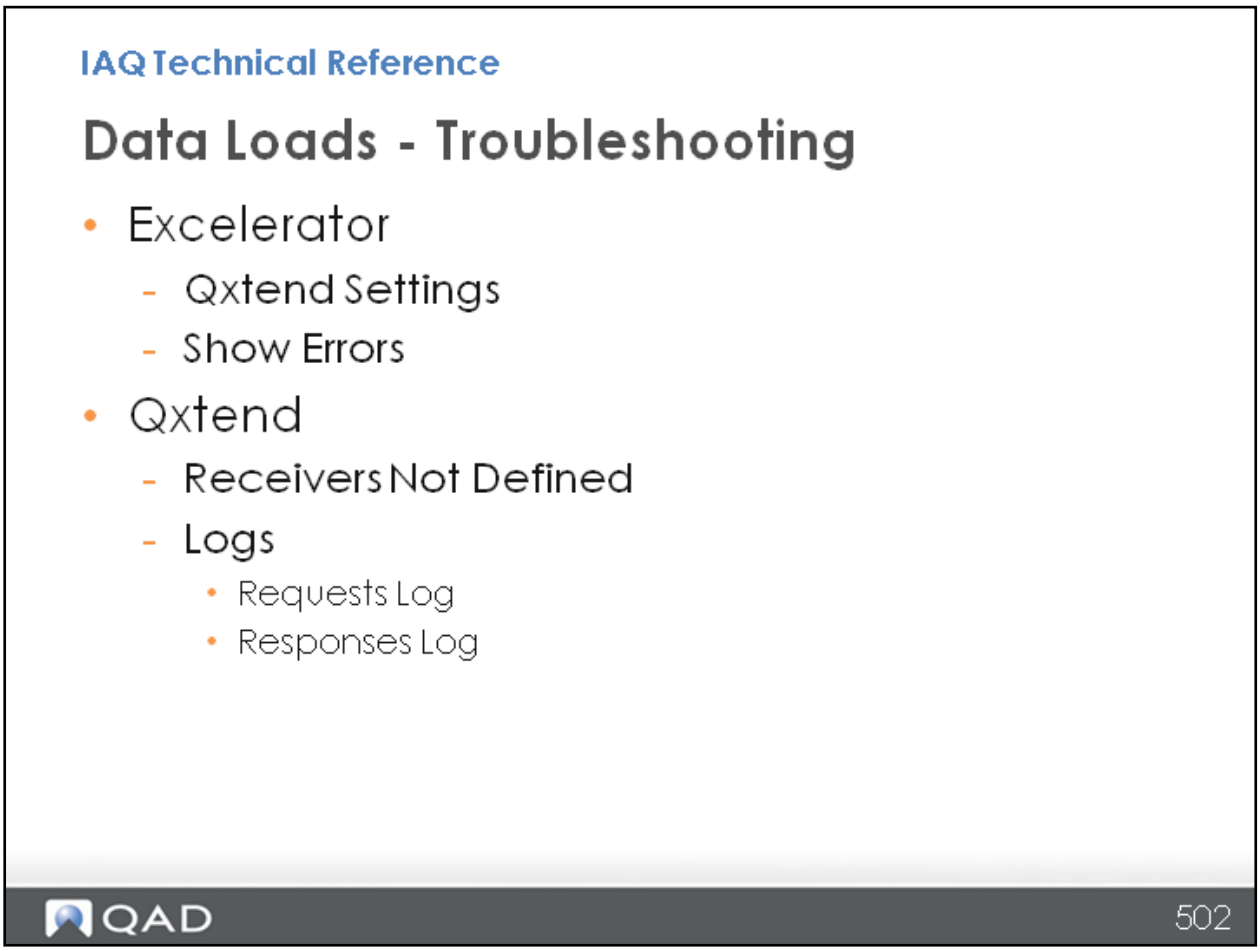
Data Loads and API's - Qdocs List



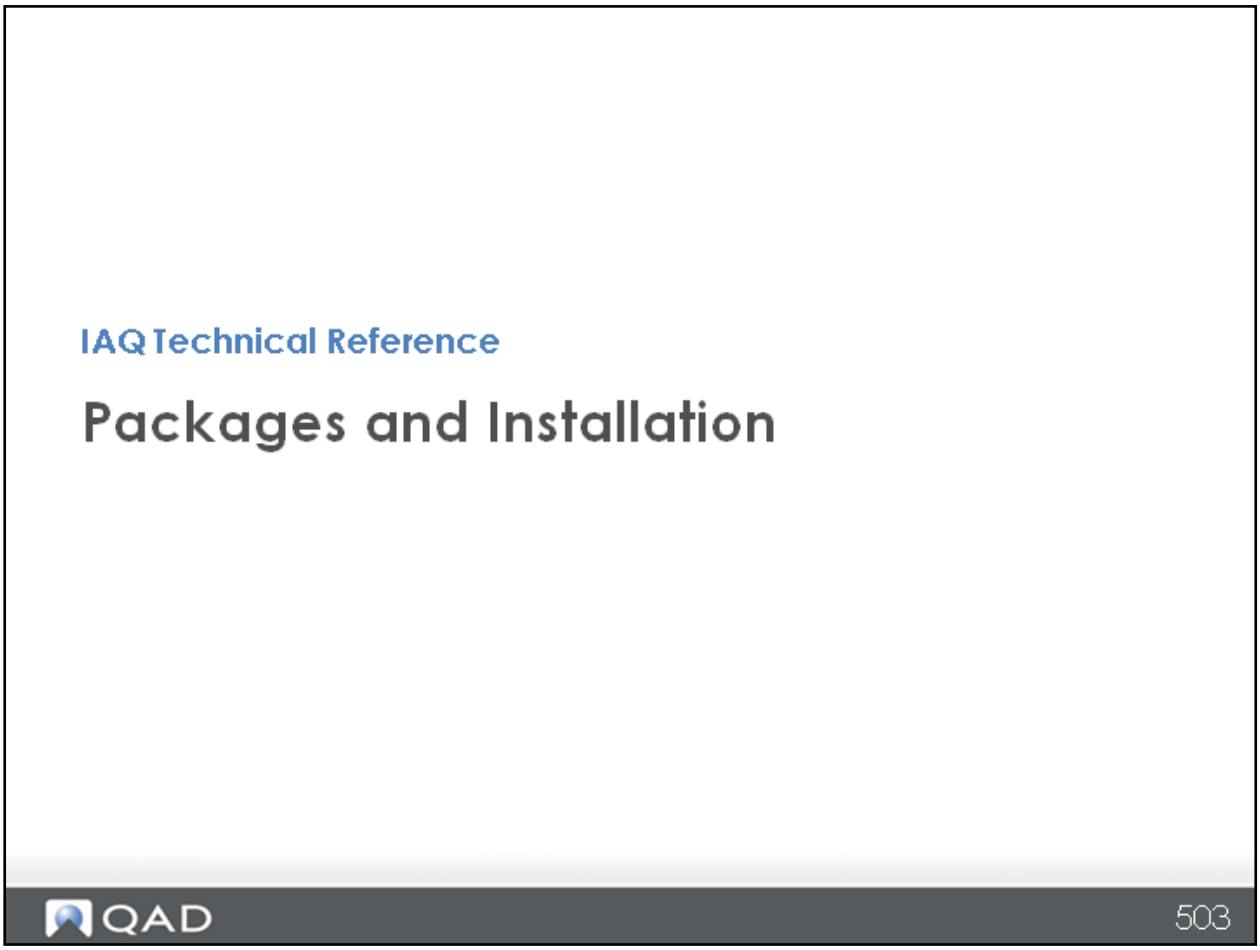
Data Loads - Excelerator



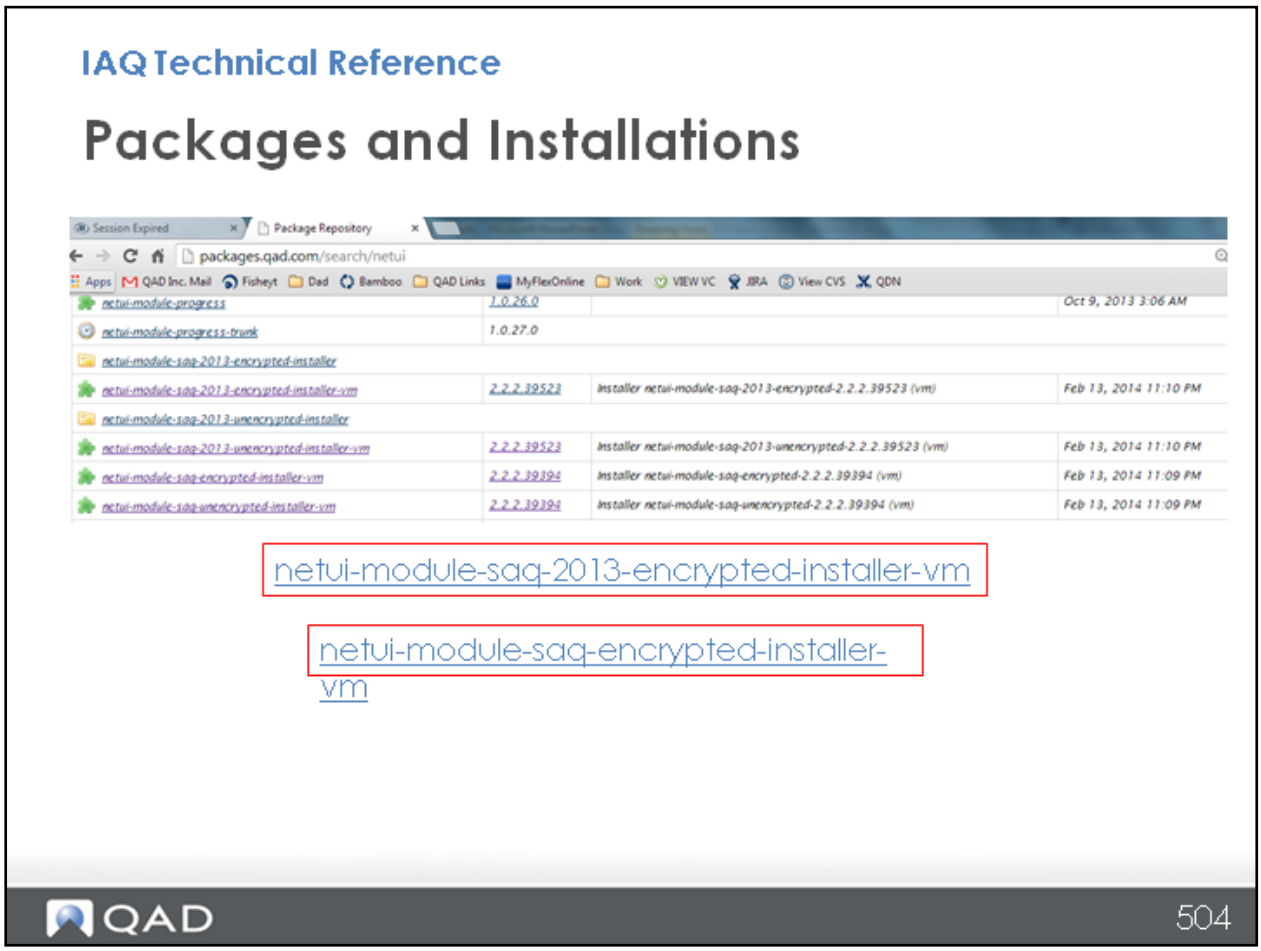
Data Loads - Troubleshooting



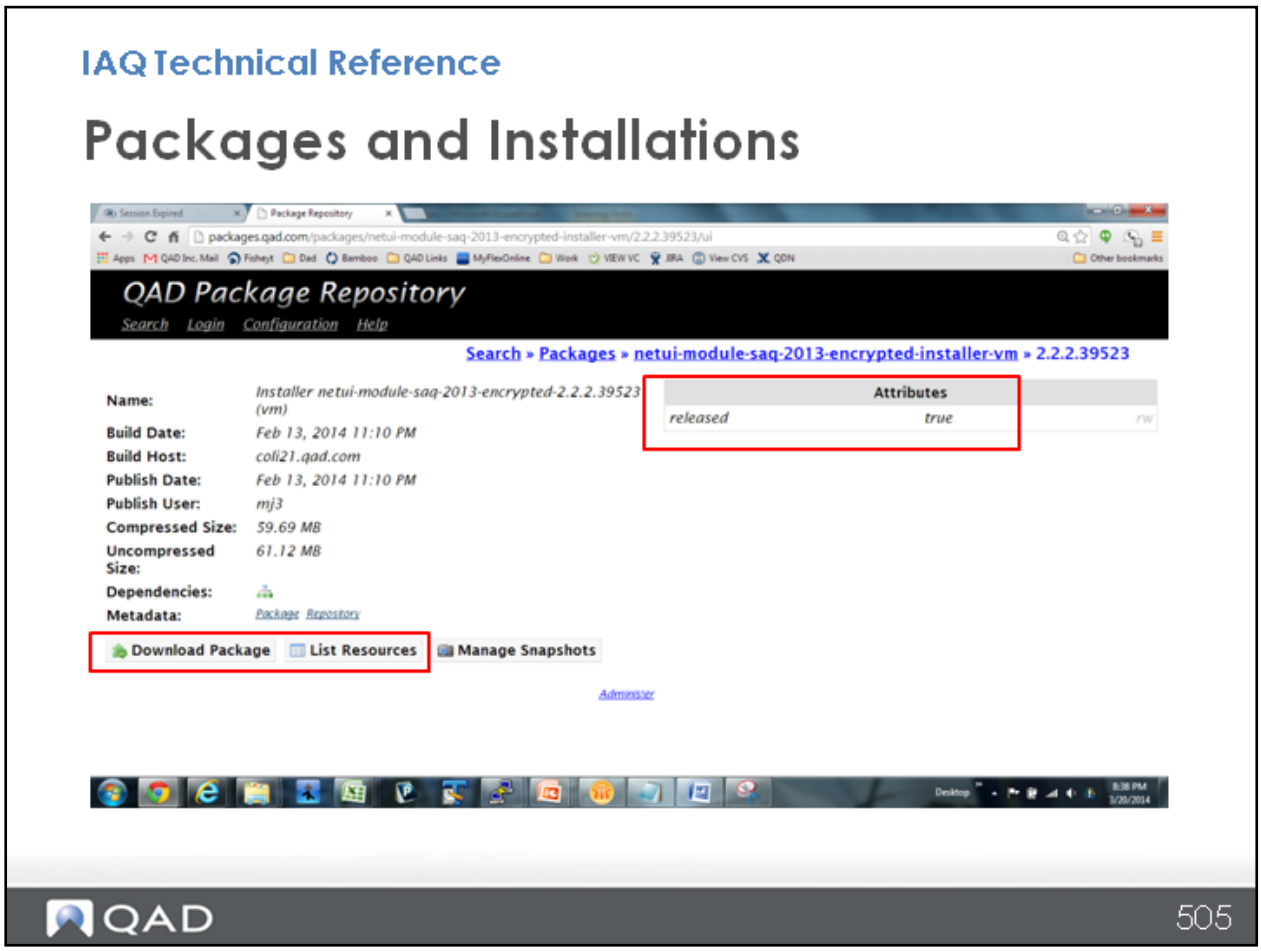
Packages and Installation



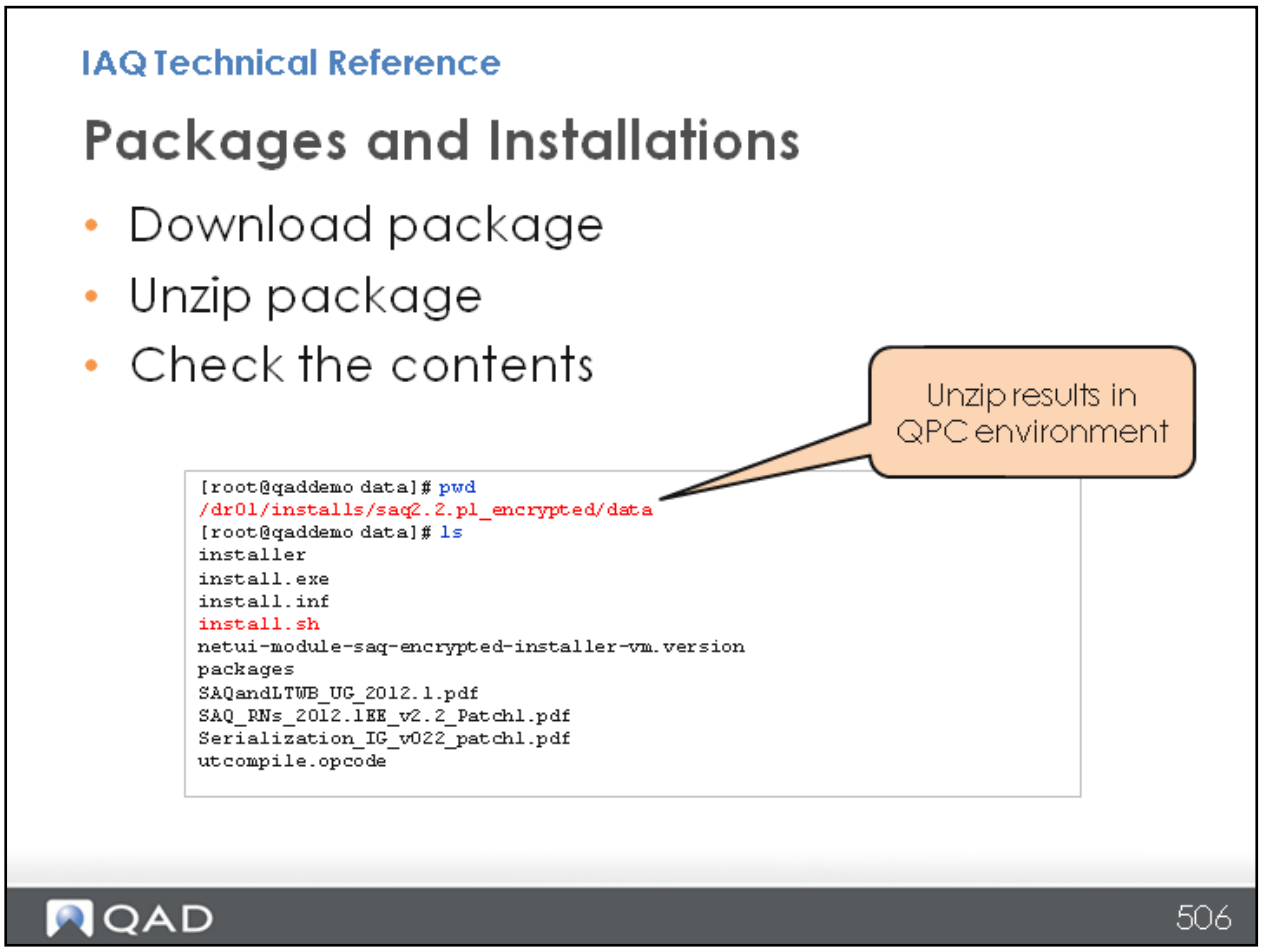
Packages and Installations



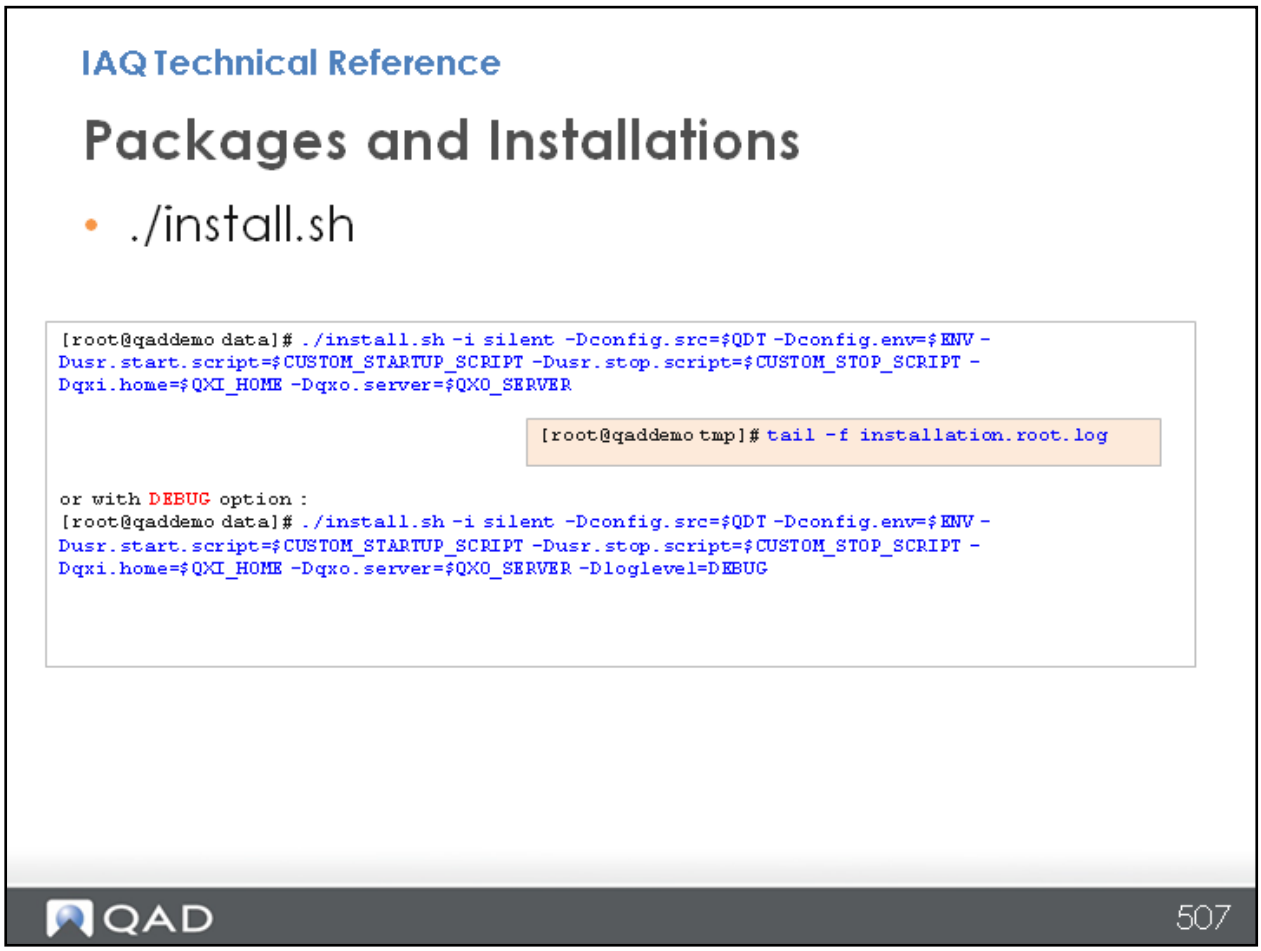
Packages and Installations



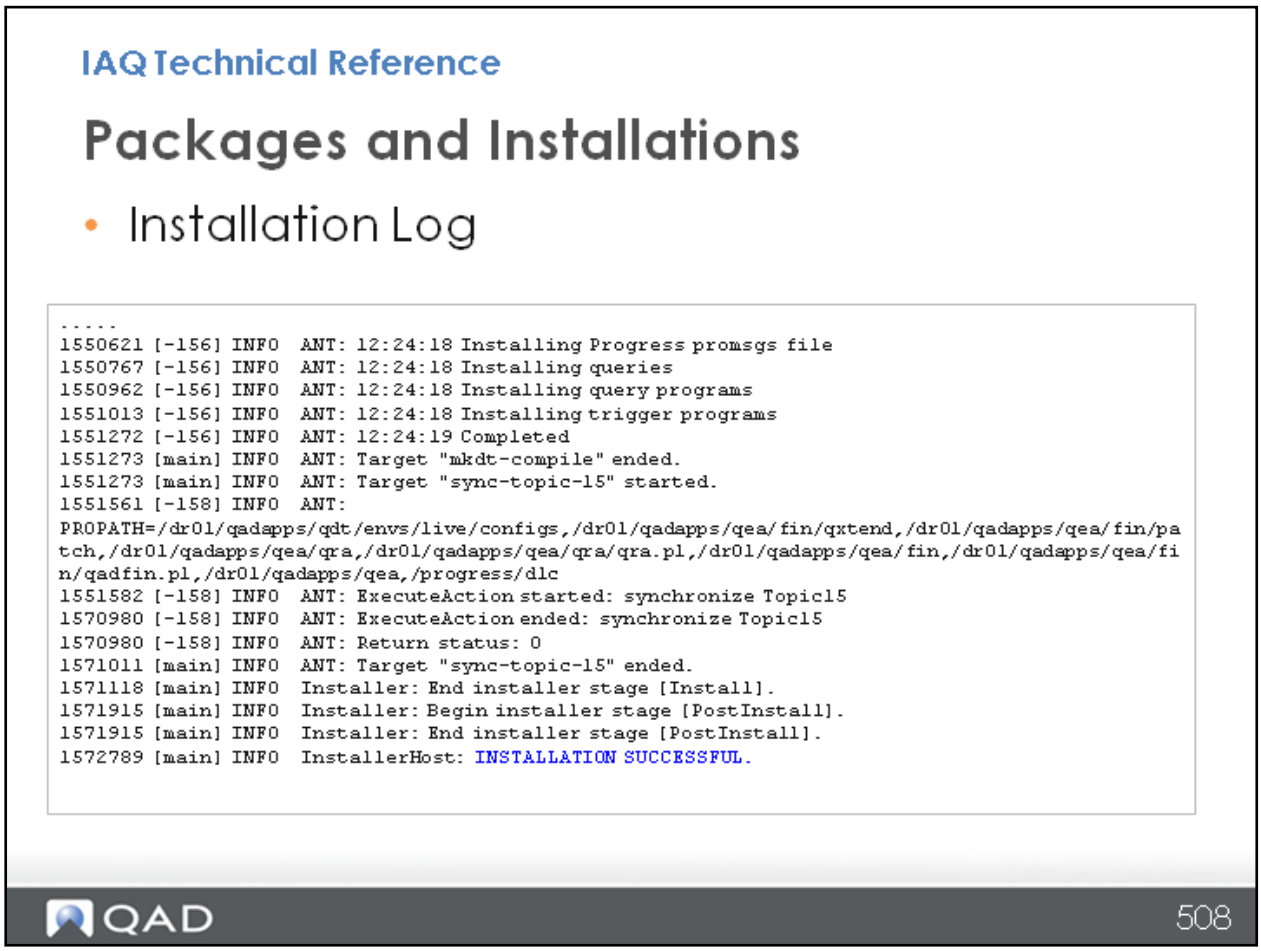
Packages and Installations



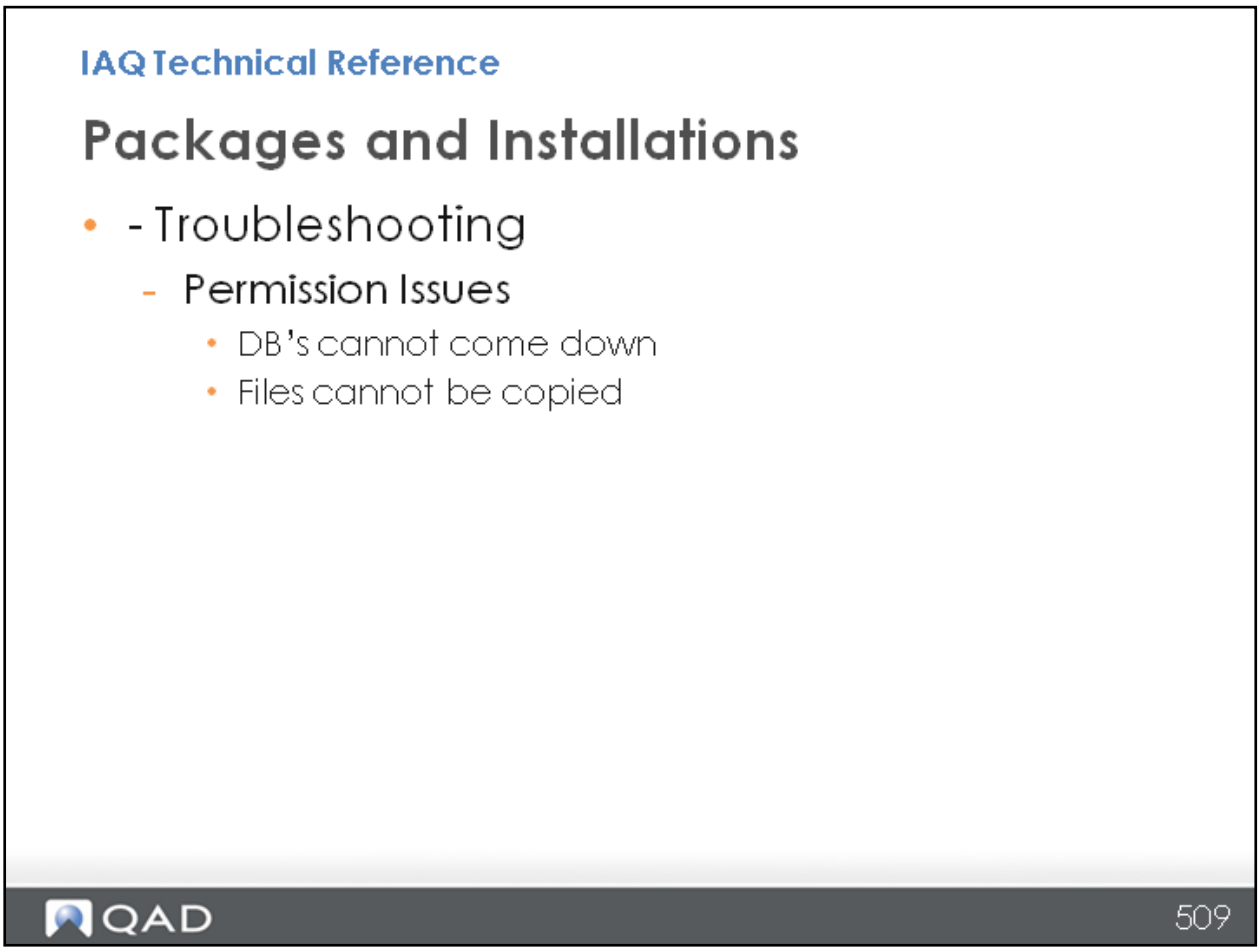
Packages and Installations



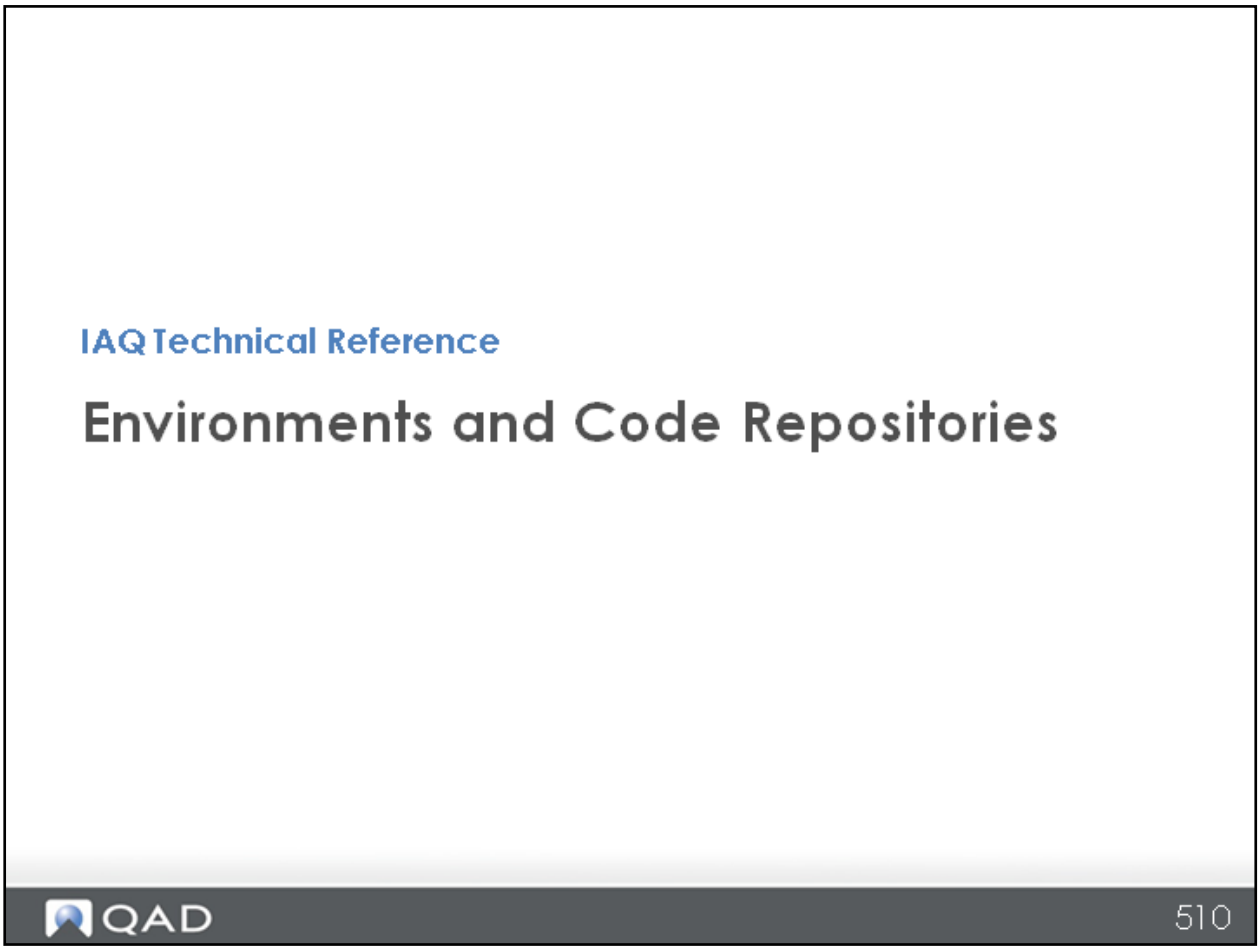
Packages and Installations



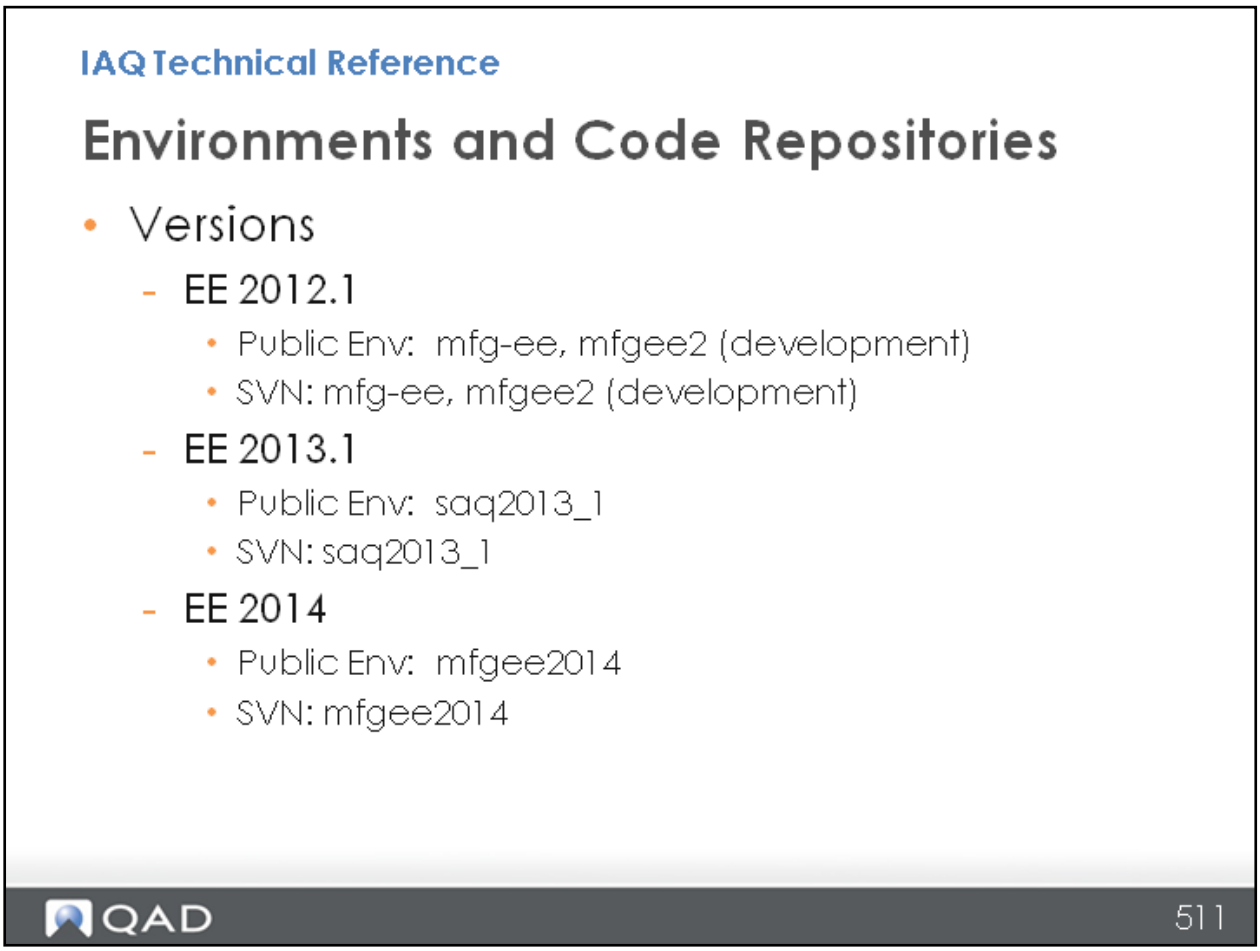
Packages and Installations



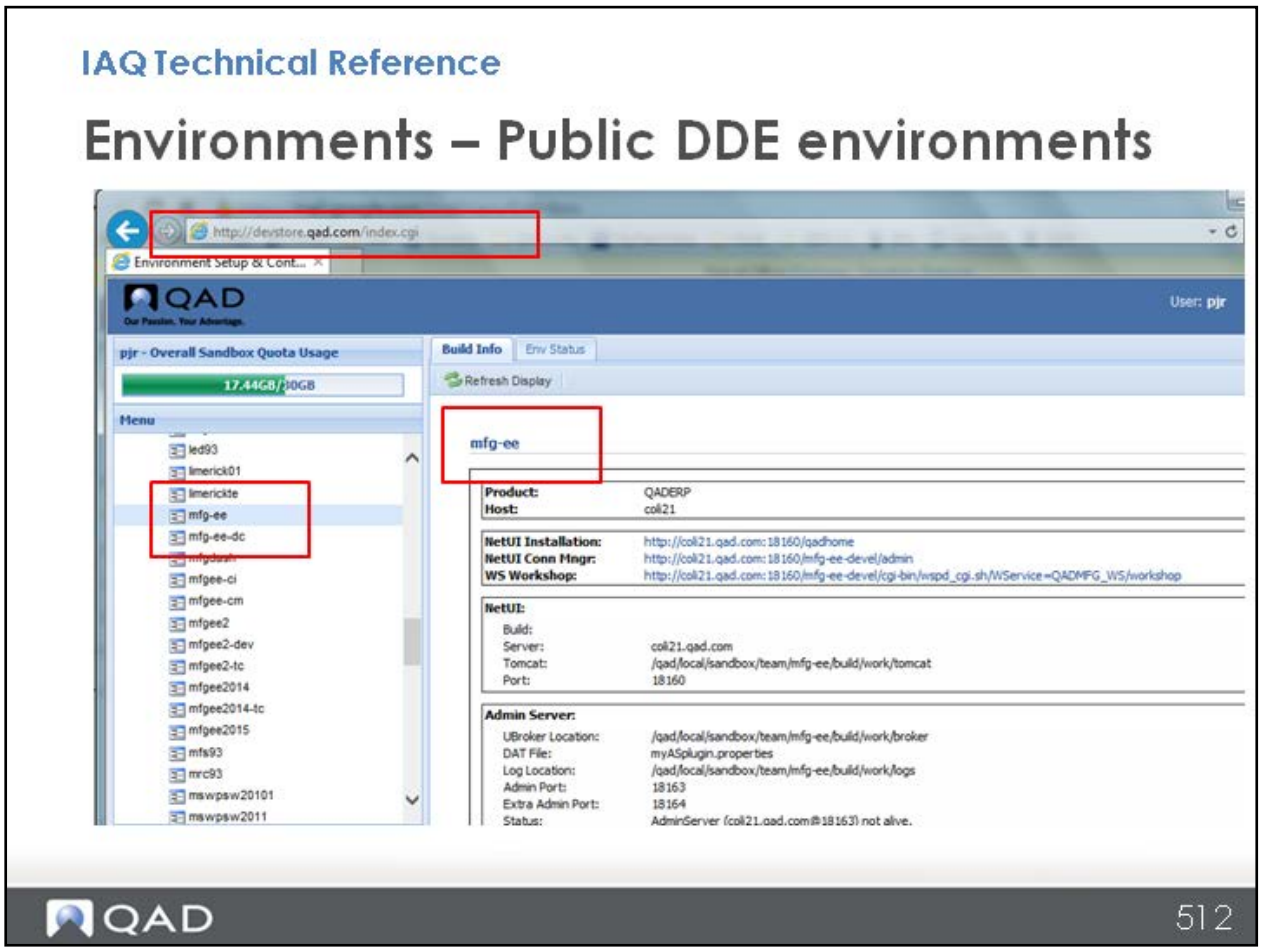
Environments and Code Repositories



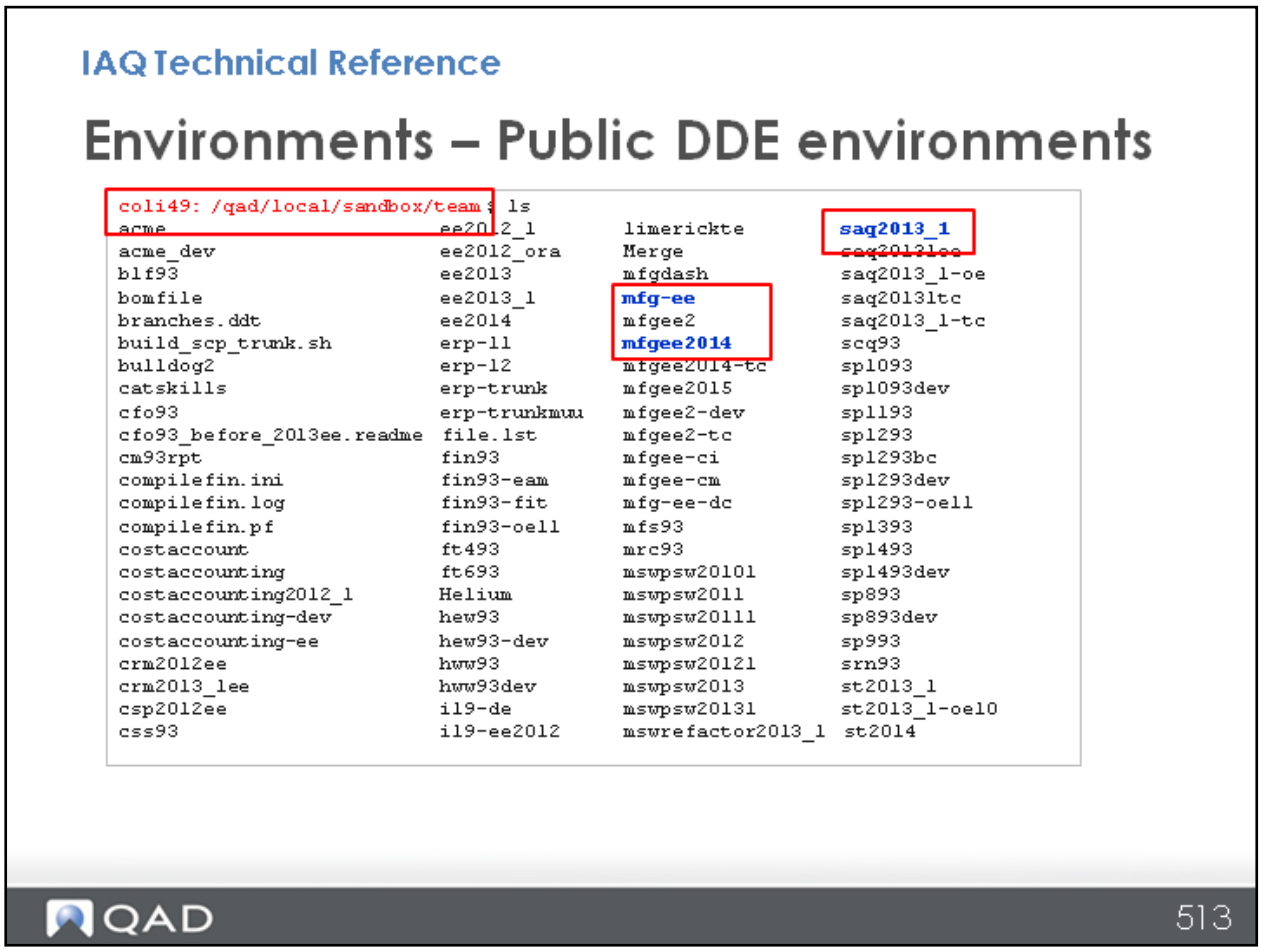
Environments and Code Repositories



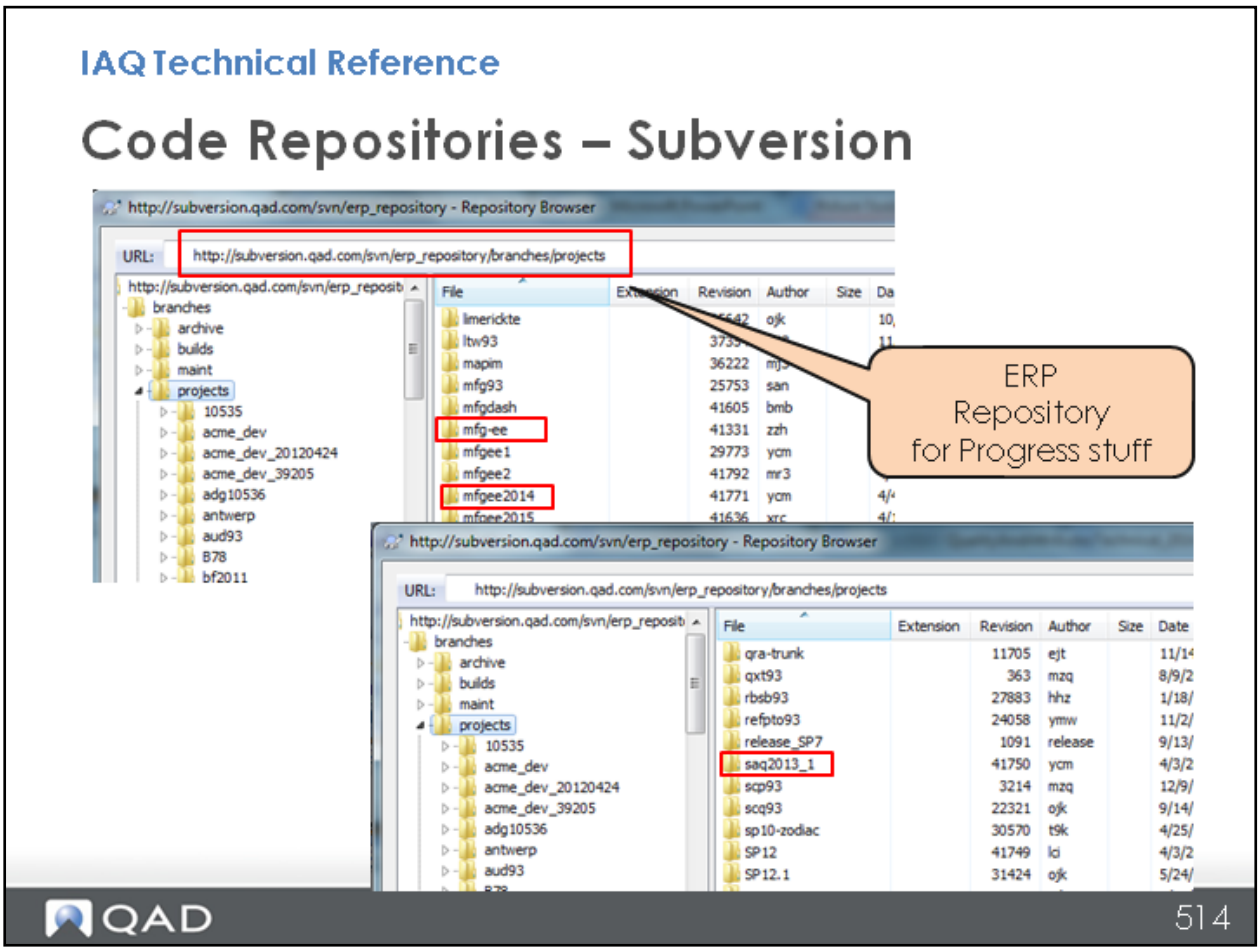
Environments – Public DDE environments



Environments – Public DDE environments



Code Repositories – Subversion



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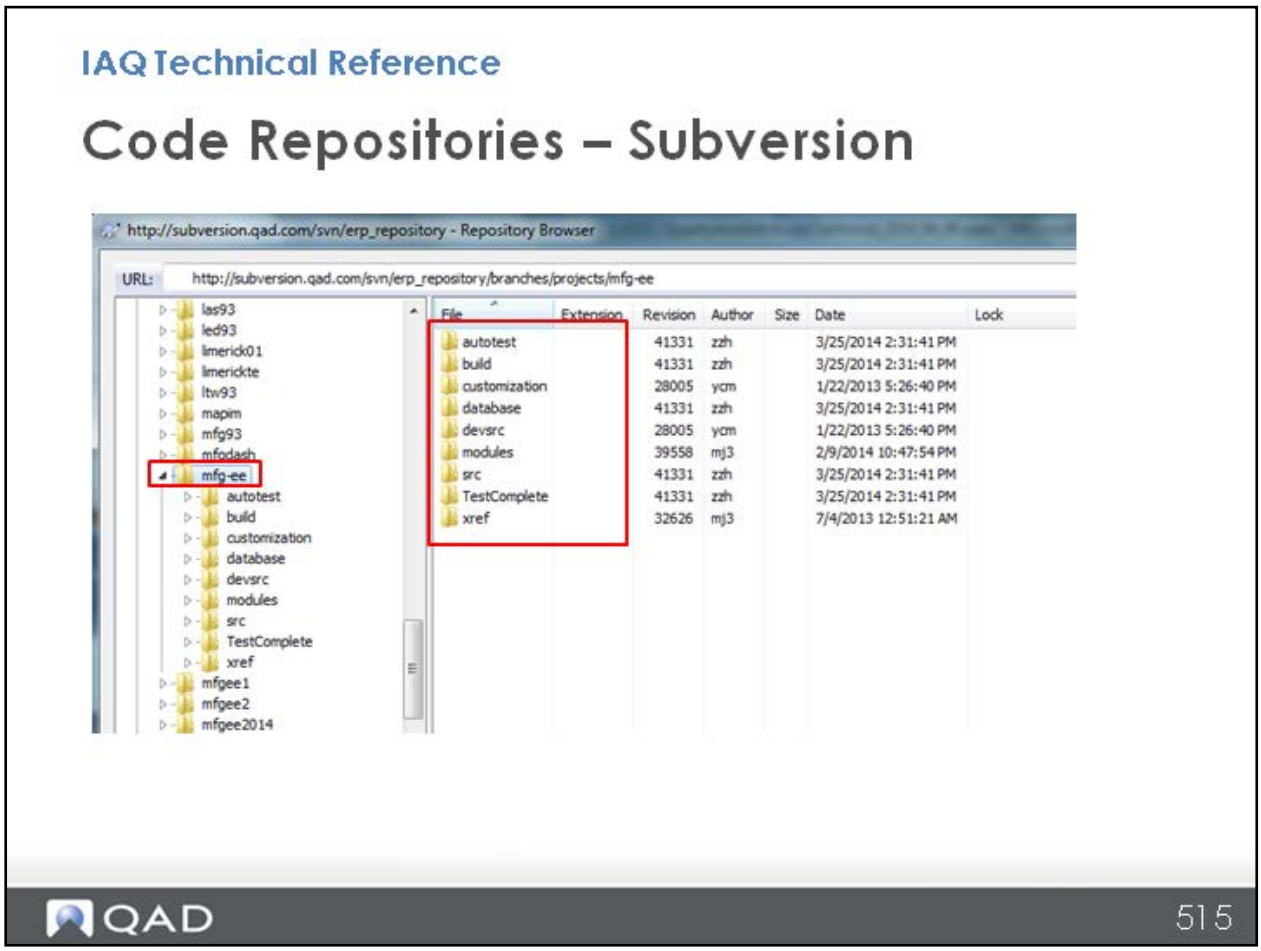
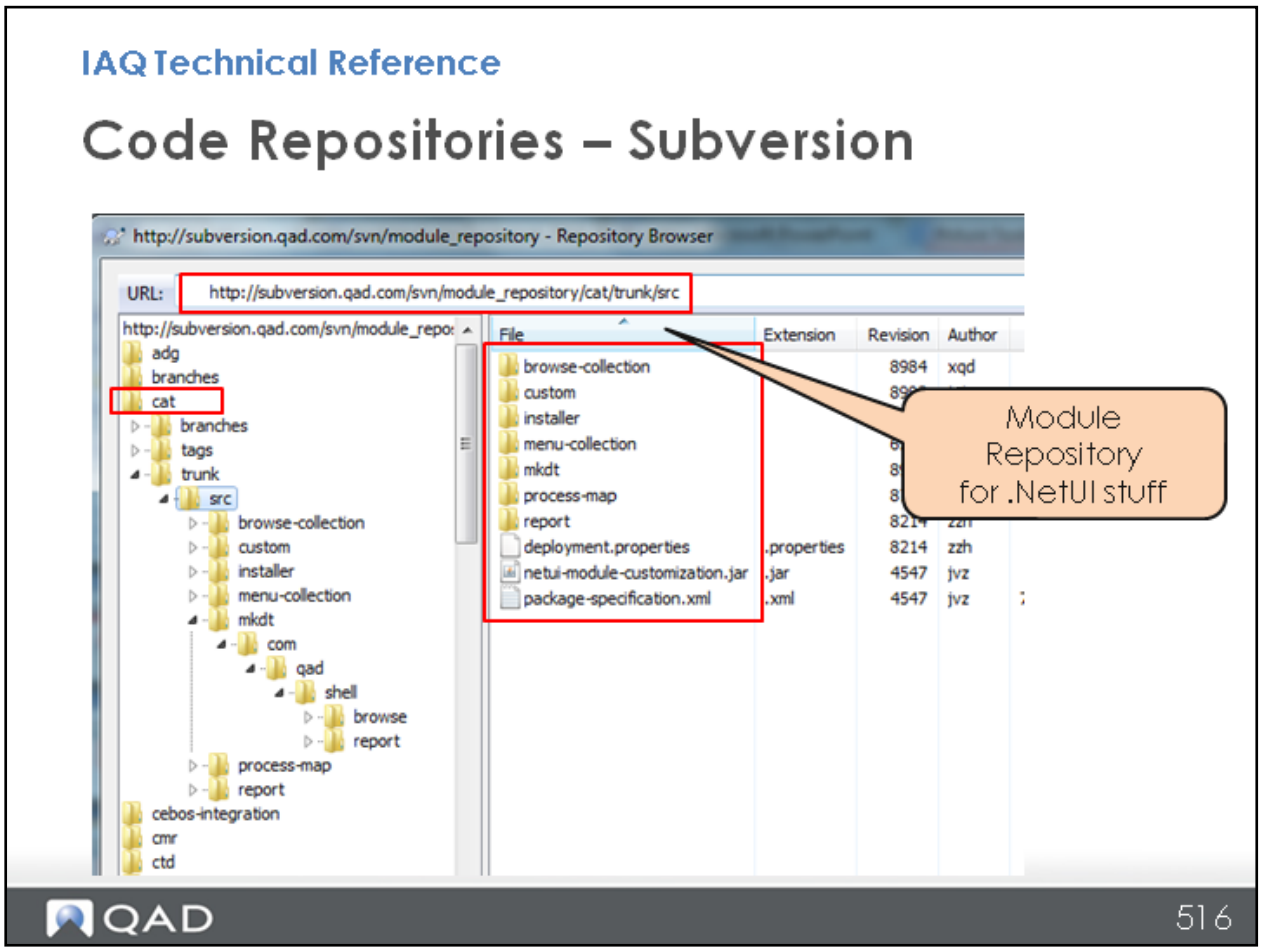
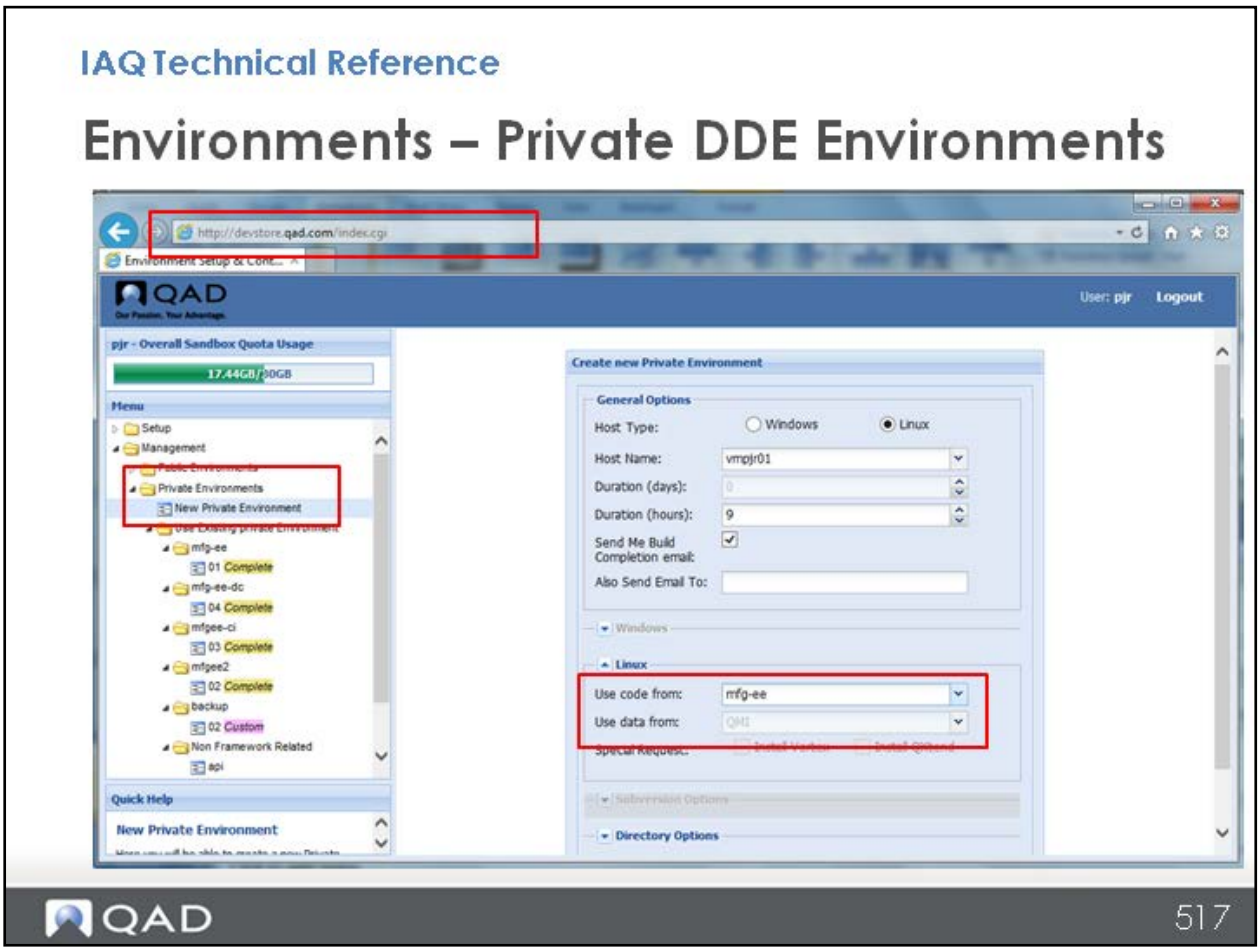


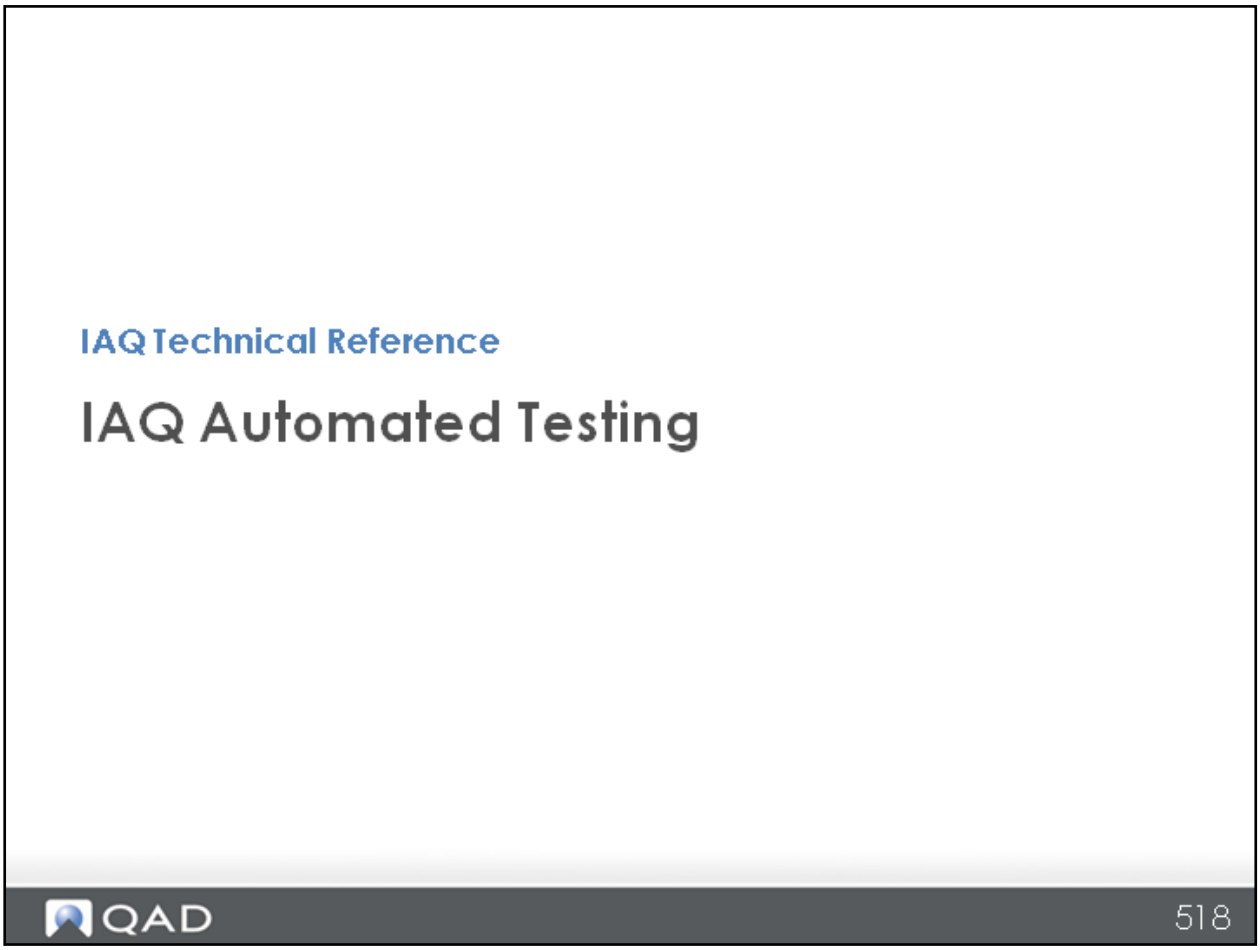
Code Repositories – Subversion



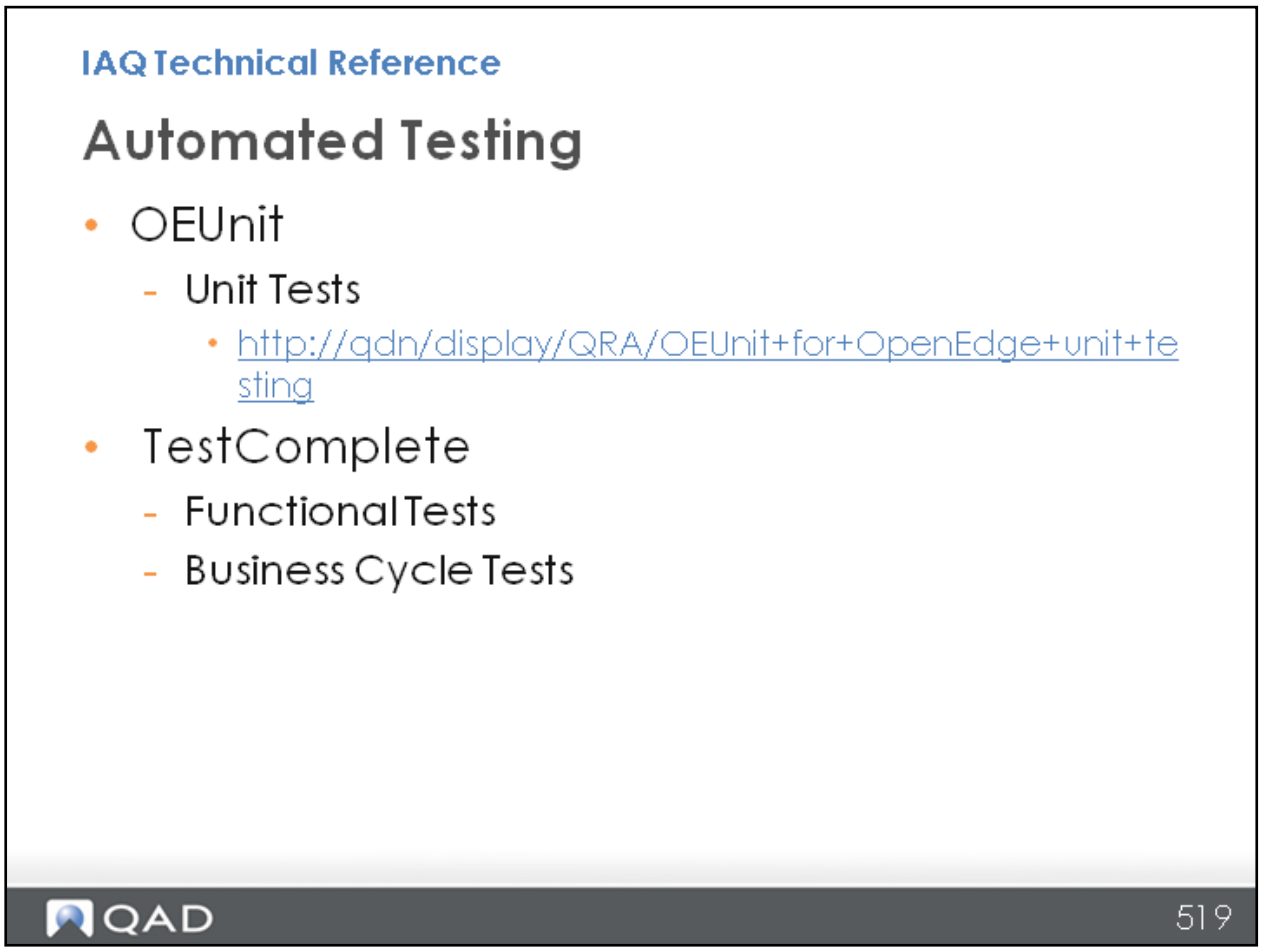
Environments – Private DDE Environments



IAQ Automated Testing



Automated Testing



Automated Testing