COSMO QUALITY ASSURANCE

Online Help PDF

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COSMO Quality Assurance

COSMO Quality Assurance enables you to create test orders manually or automatically within the complete supply chain (from the purchase order via manufacturing to the point of the shipment or the sales return order). COSMO Quality Assurance provides you with the system-related preconditions to guarantee the required quality of raw materials and products and to document this quality assurance within the ERP system and, therefore, within the process chain.

In the Test Device Management functionality, Test Orders can be prepared for all Test Devices used for testing the Test Properties. The Test Devices, Test Properties, and Test Property Sets that are defined in the related master data are combined into Test Plans which serve as a template for Test Orders.

Furthermore, this module contains the logic of DIN ISO 2859, which is the acceptance random sample testing based on the number of faulty units or errors.

It is also possible to create test orders manually without any reference to purchase or manufacturing, for example, if an inspection of stored goods should be performed.

Caution

Due to conflicts with standard Microsoft Dynamics 365 Business Central, you cannot use the Undo Receipt or Get Source Document features with purchase returns if you use the Draw Sample, Transfer to Blocked Location, or Lot-/Serial No. Status functionality in COSMO Quality Assurance. When samples are drawn, transfers are made to a blocked location, or the status is changed on releasing and/or finishing a Test Order, the Test Order schedule prevents the posting of another document that intends to undo the item posting (completely or in parts) from the source document. Therefore, you must manually add lines to a purchase return for proper processing.

Key Features

- Incoming goods inspection
- Manufacturing inspection
- Customer and Vendor specific test plans
- Test device management
- DIN ISO 2859 - Part 1
- Lot-/Serial No. status to control inventory availability
- Quarantine and Release management
- Sample planning

- 8D Report creation
- Error categorization
- Extended lot tracking
- Extended controls for quality assurance

Access COSMO Quality Assurance functionality using the Tell Me feature in Microsoft Dynamics 365 Business Central. Choose the icon, enter the page name, and then choose the related link.

> **Note**
> **The content in COSMO Docs reflects the most current version of the COSMO Quality Assurance app. If your company is using a different version, you may not have some of the described features. If you are using an older version or an On-Premises version of the app, see the specific product content in COSMO CONSULT Product Documentation.**

Feedback

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Getting Started

This section covers the app installation, licensing, registration, and activation processes required to use COSMO Quality Assurance. Additionally, the role centers that provide the most efficient user experience are described.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Install COSMO Quality Assurance in a SaaS or OnPremises environment.	App Installation
License and register COSMO Quality Assurance.	App Licensing and Registration
Make pages and controls visible for the app.	App Activation
Learn about the role centers that can be assigned to users to provide the most efficient COSMO Quality Assurance user experience.	Role Centers

Feedback

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App Installation

This section covers the installation of the COSMO Quality Assurance app. Typically an installation is only performed once by an administrator and is not executed by the user. The installation differs for SaaS and On-Premises (OnPrem) environments.

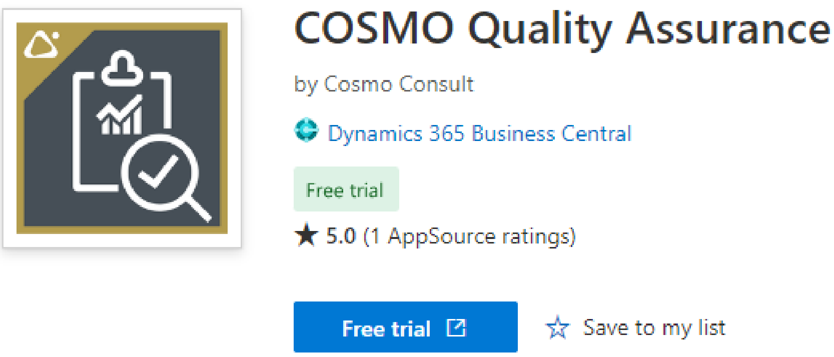
To install in SaaS environment

In SaaS environments, the app can be installed from the AppSource. There are two ways to install the app: externally or internally from Business Central. All dependencies are installed automatically.

Depending on the current Microsoft upgrade policy, you may not have the most current version of the app. To upgrade to the most current version, go to the Dynamics 365 Business Central admin center and perform the app upgrade for your environment.

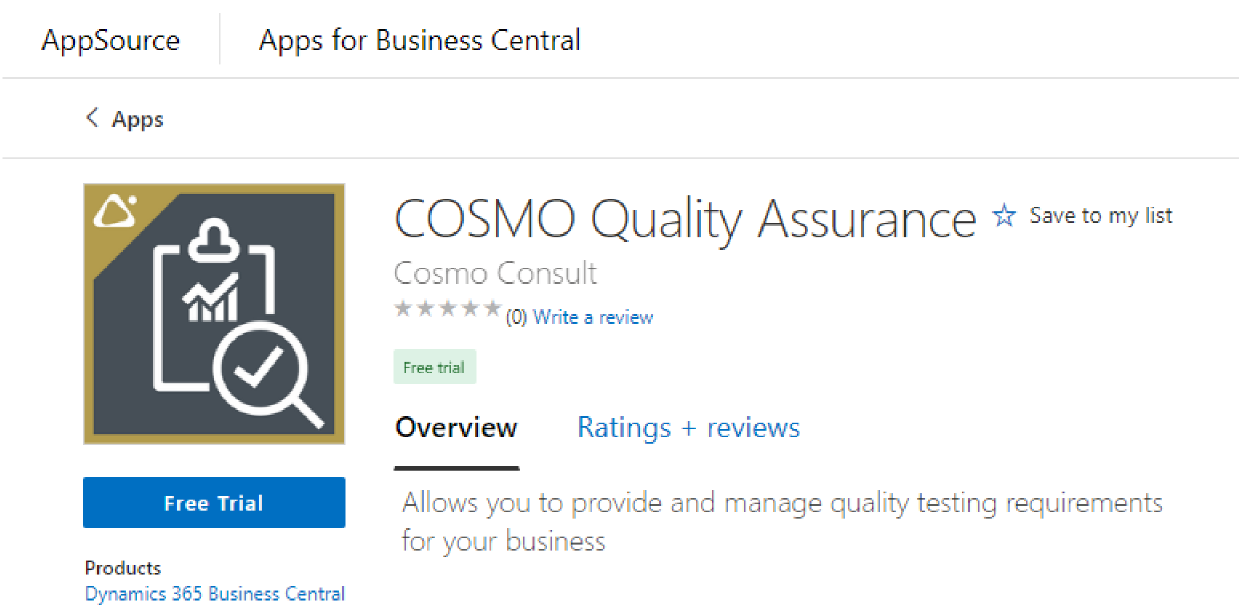
AppSource

Visit the AppSource and then choose Free trial. You will be forwarded to a page where you must log in with your Business Central user credentials and select an environment to install the app to. Follow the wizard instructions to complete the installation.



Extension Marketplace

In Business Central, choose the icon, enter Extension Marketplace, and then choose the related link. In the marketplace, search for COSMO Quality Assurance and then choose Free Trial. Follow the wizard instructions to complete the installation.



To install in on-premises environment

To install the COSMO Quality Assurance app and its requirements in an on-premises environment, you can find the app files in the COSMO CONSULT Solution Portal. Check the technical specifications of each version to find the minimum dependent version of *Business Central* and the *Base Application*. For customer installations without a Business Central developer license, you must create and install a runtime package of the app (Microsoft Documentation).

Besides the Business Central Base Application, the app depends on additional apps that must be installed in the correct order first.

1. COSMO Licensing app
2. COSMO Quality Assurance app

See Also

App Licensing and Registration
App Activation
Role Centers

Feedback

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App Licensing and Registration

This section covers the licensing, registration, and license check of the COSMO Quality Assurance app. When installing the app, COSMO Licensing is automatically installed. After installing the app, you need to register it either with a license activation code or a trial license.

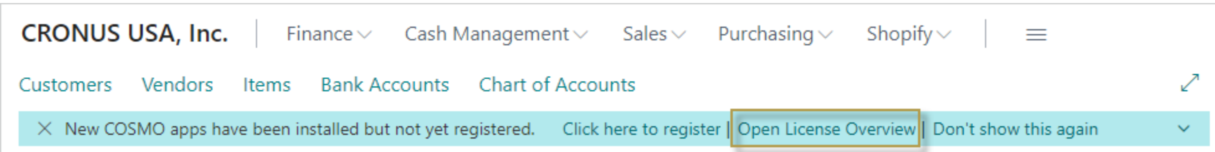
> **Note**
> **App registration by activation code is available if COSMO Licensing version 2.2 or higher is installed. Customers who purchase new COSMO product subscriptions through our Marketplace will receive an activation code.**
> **If you do not have the option to enter an activation code or have not received an activation code, follow the steps in the Register the app with a trial license section.**
> **After you have registered, you can contact appsource@cosmoconsult.com to convert your 30-day trial license to a full license.**

To assign licensing permission set

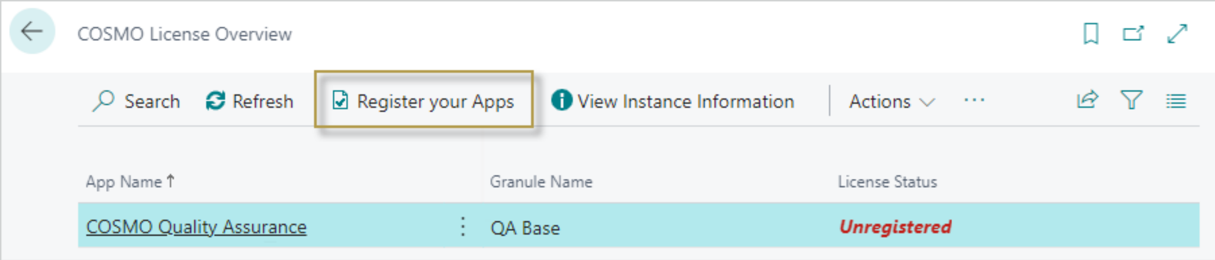
The COSMO Licensing app provides an extension permission set with Role ID = *CCS LIC ALL*. This permission set must be assigned to all users in the database to allow access to the COSMO License Overview page and, more importantly, to the licensed COSMO CONSULT apps. App-specific permission set(s) must be assigned to users in the database to allow access to the licensed functionality.

To open the COSMO License Overview

1. If the registration notification does not show in the notification bar, refresh the environment.



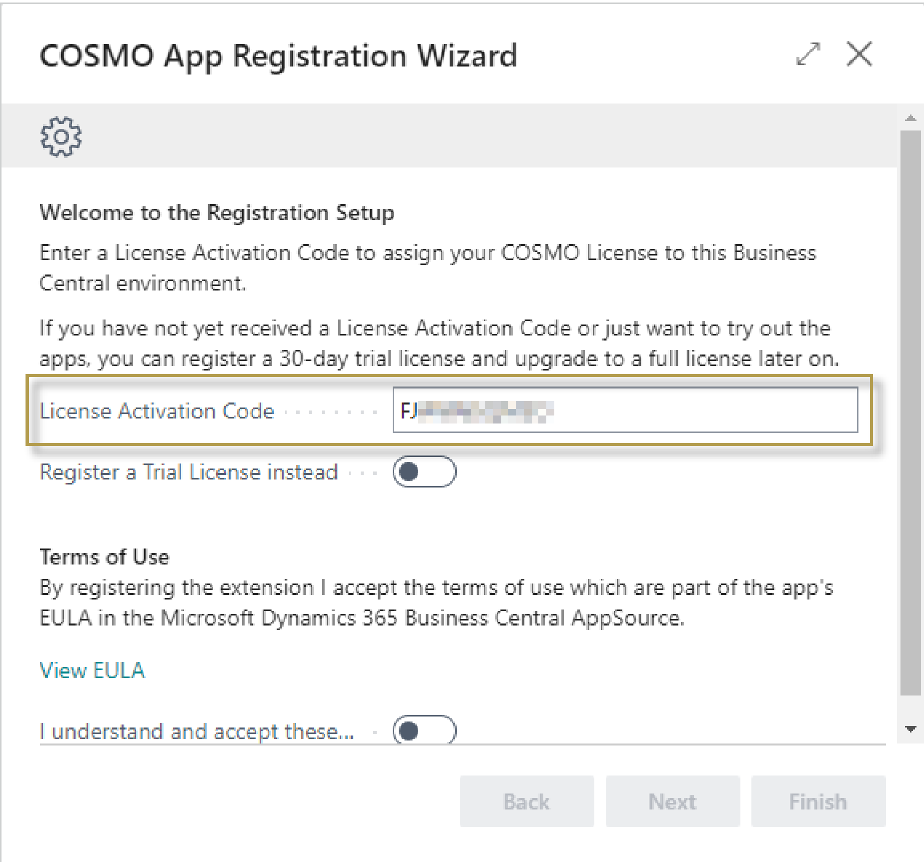
2. On the notification line, choose Open License Overview.
   The app is listed in the COSMO License Overview page with Status = *Unregistered*.



3. Choose the Register your Apps action.
   The COSMO App Registration Wizard opens with the registration options.

To register the app with license activation code

1. If you purchased the Business Central app through our Marketplace, you will have received an activation code by email.
   Enter this activation code in the License Activation Code field on the first page of the COSMO App Registration Wizard.

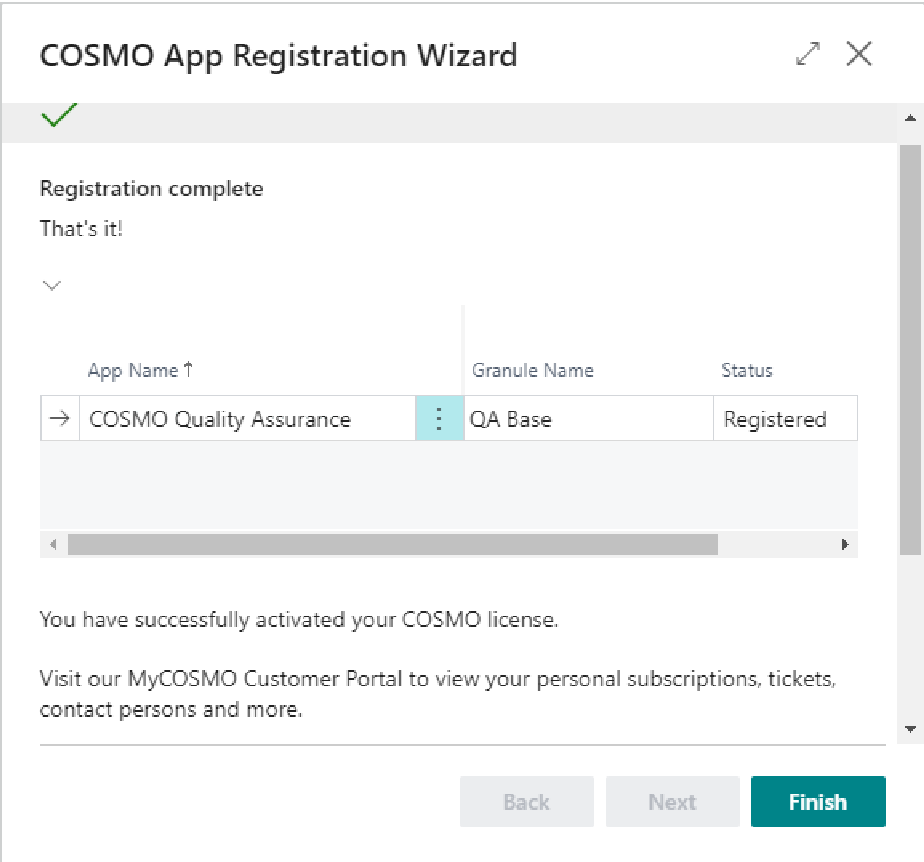


Note

In SaaS environments, an activation code can be used for exactly one production system. The same activation code can additionally be used in multiple SaaS environments (sandbox environments, e.g., test/demo/development environments).

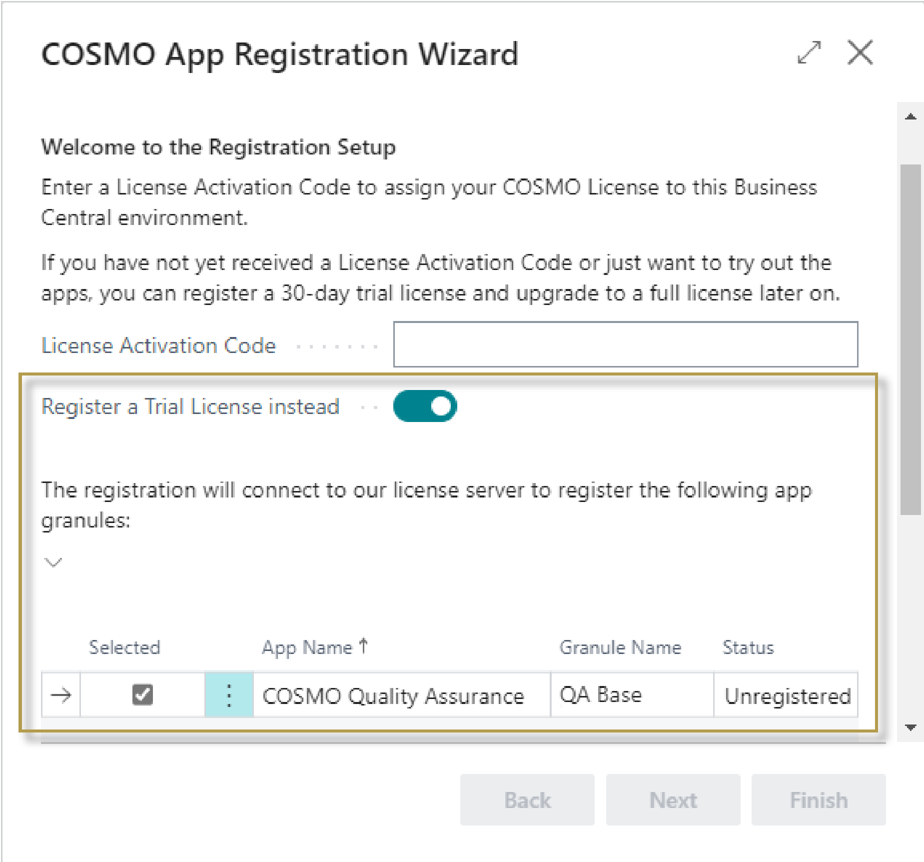
For On-premises, there is no technical distinction between *Production* and *Sandbox*, so the activation code is instead connected to the serial number of the Business Central license (.flf / .bclicense) with which it was first activated. Therefore, it is possible to use it On-premises multiple times with the same Business Central license (to allow use in test/demo/development environments). Once it has been redeemed, it cannot be used in BC environments with another BC license.

2. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
3. You have successfully registered your app. Choose the Finish button to close the wizard.
   The license connected to the entered activation code will then be automatically retrieved.



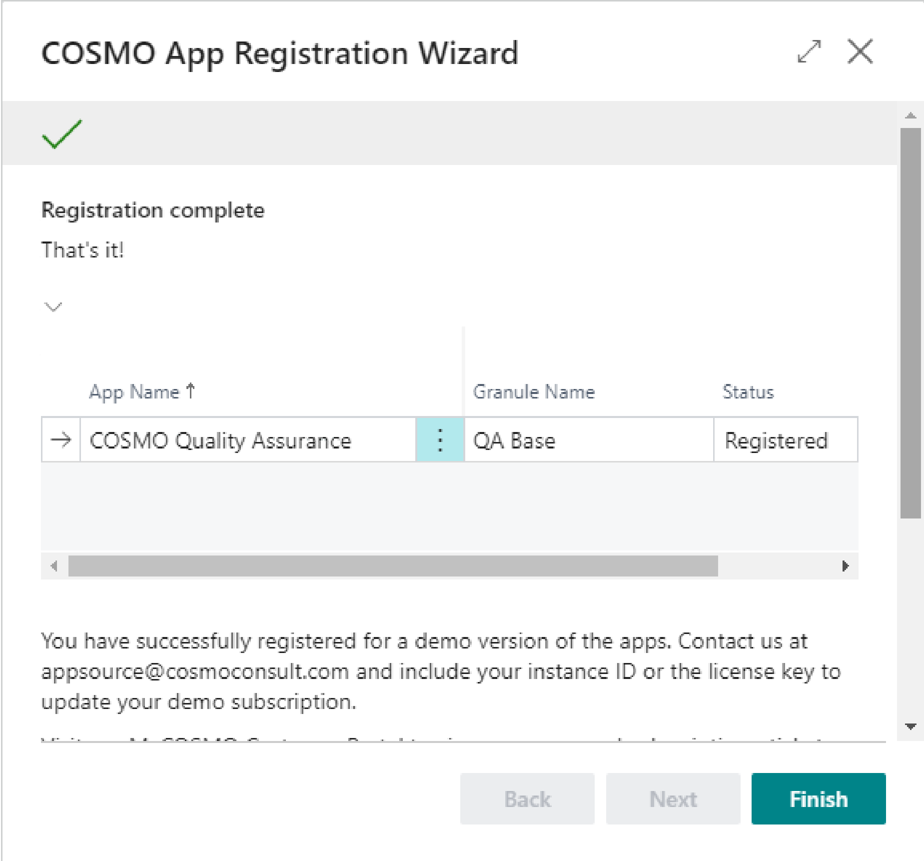
To register the app with a trial license

1. If you turn on the Register a Trial License instead toggle on the first page of the COSMO App Registration Wizard, the app granule to be registered is displayed.



2. In order to agree to the Terms of Use, scroll down, turn on the I understand and accept these terms toggle, and then choose the Next button.
3. Enter your customer name. The name is used to identify the company. For test purposes, enter any Cronus-related name.
4. Choose the Next button to sign into the COSMO Platform to link the registration with your account. The COSMO Platform opens in a new browser tab. After signing in you can close this tab and return to the final page of the COSMO App Registration Wizard.

   To skip this step, choose the Skip Login button.
5. You have successfully registered for a 30-day trial version of the app. Contact appsource@cosmoconsult.com and use the displayed license key to update your trial subscription.
6. The app has Status = *Registered*. Choose the Finish button to close the wizard.



7. The status for the app is updated in the COSMO License Overview page. Leave the COSMO License Overview page to return to the Role Center.

> **Note**
> **You can register the app and perform other administrative licensing tasks from the COSMO License Overview page.**

To check the license

The COSMO License Overview page lists the license status of the COSMO app and is accessed using the Tell Me feature.

1. Choose the icon, enter COSMO License Overview, and then choose the related link. This page can also be opened from the Quality Assurance Setup page (Actions > App Licensing) and from the last page of the COSMO App Registration Wizard by choosing Open License Overview.
2. In the COSMO License Overview page, the app can be registered if not done on the Role Center notification bar. Other administrative tools are available as well.
3. Hover over an action on the COSMO License Overview page to read a short

description.

See Also

App Installation
App Activation
Role Centers
Quality Assurance Setup

Feedback

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App Activation

Quality Assurance Setup has its own activation button in the setup page that makes pages and controls visible for the product.

> **Note**
>
> **Turning on the toggle in the setup pages will require logged in users to restart the application.**

1. Choose the icon, enter Quality Assurance Setup, and then choose the related link.
2. On the General FastTab, turn on the Activate Appl. Area toggle.
3. Close the page or continue with further setup (see Quality Assurance Setup).

See Also

App Installation
App Licensing and Registration
Role Centers

Feedback

Submit feedback for this page .

Role Centers

COSMO Quality Assurance includes the following Role Center pages that have been set up as Profiles (Roles):

- 5034550, Quality Manager
- 5034568, Purch. Quality Manager
- 5034817, Qlty. Manager Essential

Quality Manager Role Center

The *Quality Manager* Role Center provides the most efficient COSMO Quality Assurance user experience for managing quality assurance processes, including test planning, incoming goods/manufacturing/pre-shipment inspection, retesting, stability testing and non-conformity management.

In addition to various actions, such as creating test orders, sales orders, and purchase orders, you also have direct access to various tasks, such as scheduling test orders and incidents, as well as navigation features, and the Item Expiration Date report.

The Activities part has cues for created test incidents and orders, ongoing test incidents, value recording and testing finished test orders, recalls, 8D reports, and pending customer certificates. In the Insights part, you can set your commonly used items in the My Items part and test devices in the My Test Devices part.

> **Note**
> **This role center is used with User Experience = *Premium* in the Company Information page. For more information, see User Experience.**

Purch. Quality Manager Role Center

The *Purch. Quality Manager* Role Center provides the most efficient COSMO Quality Assurance user experience for purchase processing functionality, including purchase orders and return orders, test devices, test properties, test property sets, test plans and finished/cancelled test orders.

In addition to various actions, such as creating test orders, sales orders, and purchase orders, you also have direct access to blocking test devices, navigation, and the Item Expiration Date report.

The Activities part has cues for pre-arrival and post arrival follow-up for purchase orders and purchase return orders, receipt testing of test orders, and active 8D reports. In the Insights part, you can set your commonly used items in the My Items part and test devices in the My Test Devices part.

Qlty. Manager Essential

The *Qlty. Manager Essential* Role Center provides the most efficient COSMO Quality Assurance user experience for managing quality assurance processes *without manufacturing and service*, including test planning, incoming goods/pre-shipment inspection, retesting, stability testing, non-conformity management, and closed documents.

In addition to various actions, such as creating test orders, sales orders, and purchase orders, you also have direct access to creating retest orders, as well as navigation features, and the Item Expiration Date report.

The Activites part has cues for created test incidents and orders, ongoing test incidents, value recording and testing finished test orders, recalls, 8D reports, and pending customer certificates. In the Insights page, you can set your commonly used items in the My Items part and test devices in the My Test Devices part.

> **Note**
> **This role center is used with User Experience = *Essential* in the Company Information page. For more information, see User Experience.**

To apply a role center

1. Choose the icon and then select My Settings from the menu. Alternatively, you can use the Tell Me feature.
2. In the Role field, choose the ellipsis button.
3. In the Available Roles page, select either *Quality Manager*, *Purch. Quality Manager*, or *Qlty. Manager Essential* and then choose the OK button.
4. Choose the OK button to close the My Settings page and save your changes.

You can also assign roles directly to users in the User Settings page.

See Also

App Installation
App Licensing and Registration

App Activation

Microsoft Documentation

Feedback

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Setup

In this section, settings are defined for base COSMO Quality Assurance, DIN ISO 2859 – Part 1 processing, and Error Catalog. These setup pages are accessed using Tell Me. Choose the icon, enter the page name, and then choose the related link.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Define the general settings for COSMO Quality Assurance.	Quality Assurance Setup
Set up units of measurements for use in various test properties.	Units of Measure
Set up user-defined analysis codes of the test properties.	Result Types
Set up locations to identify where testing can occur and who can test in the locations.	Test Locations
Authorize changes to GMP-critical functions, such as the changing of lot data and the release of test orders or production orders.	QA Permissions
Set up statuses to be assigned to a lot- or serial number to help identify testing stages.	Lot-/Serial No. Status
Create posting responsibility lot- or serial number assignments by entering an item tracking line or a reservation.	Inventory Posting Permissions
Set up lot-/serial number status visualization using colors.	Color Codes
Define a customer and item/item category combination to be used with item tracking.	Customer Item Specifications
Set up DIN ISO 2859 - Part 1 for counting (AQL) test property sets.	DIN ISO 2859 - Part 1
Set up error codes to be assigned to failed value recording of measurement tests.	Error Catalog

See Also

Additional Setup

Feedback

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Quality Assurance Setup

In the Quality Assurance Setup page, general COSMO Quality Assurance settings are defined as well as number series for the individual areas of the test order process.

To set up general Quality Assurance information

1. Choose the icon, enter Quality Assurance Setup, and then choose the related link.
2. On the Quality Assurance Setup page, fill in or update the fields as described in the following tables.

General FastTab

The fields on the General FastTab are described in the following table.

Field	Description
Activate Appl. Area	Makes pages and controls visible for COSMO Quality Assurance.
Test Order Unblocks Test Device	Determines if test devices are automatically released immediately after finishing a test order. By finishing the test order, the status of the test device is set to *Certified*.
Use Without Expected Value	If turned on, the Valid Determined Value field on the Value Recording page is calculated based on the Upper Limit and/or Lower Limit fields and therefore, the value in the Expected Value field is not considered. For more information, see Interpret Determined Value.
Prod. Test Order Creation	Determines whether and when Test Orders for production are created automatically. The options are: - *Manually*: Test Orders are not created automatically. - *Prod. Order Release*: Test Orders are automatically created when a production order is released. This function does not work when a Released Production Order is created manually. Additionally, item tracking must exist on the main production order line and any component lines (if required) in order to release the order. - *First Output*: Test Orders are automatically created when the first output is posted for a released production order. *NOTE: This function requires the Test Plan Assignment for production-related test orders (see Test Plan Assignment on Items and Item Variants).*

Field	Description
Default Blocked Item Location Code	Blocked location where a lot will be automatically transferred if the Inspection Result on its test order is *Items are not OK*.
Document Storage Point	Determines how a document is stored for Test Plans, Test Orders, Test Incidents, and Sample Occurrences. The options are: - *Document File*: All documents are stored in a centralized Document File table that can be accessed by the individual record. - *Per Record*: The document file is stored in individual records. For more information, see Document Storage.
Lot-/Serial No.-Status on Test Order Release	Status that a lot- or serial number must inherit when a test order is *Released*; used with the **Adjust Lot Status on Test** field in the **Test Plan Assignment** page (see Test Plan Assignment on Items and Item Variants).
Lot-/Serial No.-Status on Test Order Finish	Status that a lot- or serial number must inherit when a test order is *Finished*; used with the **Adjust Lot Status on Test** field in the **Test Plan Assignment** page (see Test Plan Assignment on Items and Item Variants).
Automated Test Decision	Determines if the change of Lot/Serial No. Status based on inspection result is automated. For more information, see Automated Test Decision.
Skip Message on Automated Test Decision	Determines if the Automated Test Decision function can skip the status change confirmation message. For more information, see Automated Test Decision.
Valid Result Color Code	Specifies the color that will be used in the **Description**, **Unit of Measure Code**, and **Determined Value** fields in the Value Recording Worksheet if the result is valid. Ensure that colors are defined in the Color Codes. For more information, see Operator-Centric Recording of Quality Measurements.
Invalid Result Color Code	Specifies the color that will be used in the **Description**, **Unit of Measure Code**, and **Determined Value** fields in the Value Recording Worksheet if the result is invalid. Ensure that color names are defined in the Color Codes. For more information, see Operator-Centric Recording of Quality Measurements.

Field	Description
Skip Source Check for Unknown Table	Determines if Inventory Posting Permission checks are skipped for tables of third party apps that assign Item Tracking.
Inventory Overview Display	Determines whether the Quantity field on the Inventory Overview page is displayed in the current Unit of Measure or the Base Unit of Measure from the Item Card.
Default 8D Template No.	Indicates the default template to be used when creating 8D Reports (see 8D Template).
Use Unspecified Status on Test Order	Determines if unspecified statuses can be used on Test Orders (see Unspecified Inspection Result on Test Order).
Test Sched. Dummy Item No.	Indicates the dummy item number that will be used for the Test Order Scheduling process (see Test Order Scheduling).
Default Sched. Work Center No.	Indicates the default work center number that will be used for the Test Order Scheduling process (see Test Order Scheduling). When no testing activity is assigned, this Work Center will be selected for rescheduling Test Orders based on system date plus Wait Time.
Update From Certified Plans	Determines whether the latest valid Certified Test Plan is used for copying or all other Statuses are considered as well when running the Update Test Plans function in Test Properties or Test Property Sets. For more information, see Mass Updates of Test Plans.
Default Retest Go-Ahead Rate	The date formula entered in the Default Retest Go-Ahead Rate field uses the system date to create a range of dates for which the retest orders should be dated. For example, if system date is February 10, 2020, and 2D is entered in the Default Retest Go-Ahead Rate field, then the Retest Date in the Create Retest Order batch job will be 2/10/20..2/12/20. For more information, see Retest Orders.

Field	Description
Update Strategy for Lot Info	Determines how the quantity is posted from one lot to another in the Lot-/Serial No. Administration page. The options are: - *Always Ask*: Opens a selection window on posting when a target lot exists, asking the user to add the quantity or overwrite the lot. This selection window opens if no general/special setup is found. - *Add Quantity*: Add only the quantity from the source lot to the target lot. The lot information for the target lot is unchanged. - *Overwrite*: Overwrites the lot information of the target lot with the source lot and adds the quantity. For more information, see Lot Joining.
Automatic Lot Split on Return	If turned on, for example, on a Sales Return Order, the returned quantity can be related to a separate Trading Unit to track the returned quantity from a part of the original lot that is still in stock. For more information, see Lot Split on Sales Return.
Lot-/Serial No. Administration Record Threshold	Specifies the maximum number of filtered Lot No. Information and Serial No. Information records that can be read without producing a message when the Get Records action is run in the Lot-/Serial No. Administration page. This message is a reminder that the process could take some time and to consider adding more filters to reduce the number of records. No message appears if the total number of records is lower than the threshold or a threshold is not defined.
Skip comments update on Status posting	Determines if option to add comments is shown when posting status changes in the Lot-/Serial No. Administration page. If the toggle is turned on, then the option to enter comments during posting is not shown. For more information, see Modify Lot- and Serial Number Data.
Do not plan for expired	Determines if an expired Lot is used when the Lot has no Status.

Field	Description
Certificate Setup Update Type	Specifies whether the Certificate Setup Exists field on the sales lines are updated when opening the Quality Manager or Qlty. Manager Essential Role Center or updating the Test Plan Assignment table. The options are: - *Role Center*: The sales lines are checked every time the Role Center is opened to update the Pending Certificates cue, which can cause performance issues in environments with many sales orders. - *Assignment*: The sales lines are only updated if a record is changed in the Test Plan Assignment, which creates or removes a certificate requirement (Source Type = *Sales Order*, *Order-specific*, *Certificate*).

Numbering FastTab

On the Numbering FastTab, number series are defined for test properties, test property sets, test devices, test plans, test orders, stability tests, document files, 8D reports and templates, sample occurrences, test incidents, simulated orders, customer certificates, and testing methods.

Post Processing FastTab

The Post Processing already run field indicates if the Post Processing codeunit was run successfully.

App Licensing FastTab

The fields on the App Licensing FastTab include the app license key, the validation period, status of the license, and information regarding your license from the licensing server. The data is generated when the setup is initialized.

User Experience

The Experience field allows you to indicate if the *Essential* (common BC business functionality) or *Premium* (common BC business functionality plus Manufacturing and Service Management) user experience is used with COSMO Quality Assurance. This is the same information that is in the Company Information page.

> **Note**
> **You cannot change from *Premium* back to *Essentials* once COSMO Quality Assurance is activated.**

Actions

The actions on the Quality Assurance Setup page are described in the following table.

Menu	Action	Description
Information	About	View the current product version and copyright information.
Actions > Functions	Run Post Processing Codeunit	Run the Post Processing codeunit, which creates some setup necessary for demo data purposes.
Actions > App Licensing	Open the License Overview	Opens the COSMO License Overview page, which lists the license status of the COSMO app and allows you to register the app and perform other administrative licensing tasks. For more information, see App Licensing and Registration.

Feedback

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Units of Measure

The Units of Measure page is used to define codes and descriptions for the units of measure to be used for the various test properties in quality assurance.

If the unit of measure codes and descriptions need to be available in various languages, the translations are defined in the Unit of Measure Translation page, accessed by choosing Unit > Translations on the Related menu.

Feedback

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Result Types

The analysis codes of the test properties are entered in the Result Types page.

Result types are user-defined. You can use any available data type as a result type, which will be uniquely identified by a code. For example, a code named Visual Inspection can either be defined as data type *Boolean* (yes/no) or as data type *Option* (red, yellow, blue, green).

To set up result types

1. Choose the icon, enter Result Types, and then choose the related link.
2. Choose the New action.
3. In the Code and Description fields, enter a unique code and short description for the result type.
4. In the Unit of Measure Code field, enter the relevant unit of measure for the result type.
5. In the Data Type field, select the relevant option from the drop-down list.
6. If a *Decimal* data type is chosen, enter the proper decimal places in the Succeeding Decimal Places field.
7. Go to the next line and add another result type.

See Also

Test Properties
Test Property Set

Feedback

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Test Locations

All information regarding the locations where test properties might be tested is maintained in the Test Locations page. Test Locations can be within the organization or external test sites.

To set up test locations

1. Choose the icon, enter Test Locations, and then choose the related link.
2. Choose the New action.
3. In the Code field, enter a unique code for the test location.
4. Enter contact information in the Name, Address, Country Code, Post Code, City, Phone No., and Fax No. fields.
5. Select the Create Sample Shipment checkbox to create a Sample Shipment Card for the test location.
6. Select the External checkbox if the location is an external test site.
7. In the Vendor No. field, enter the relevant vendor if one is related to this location.

User Test Locations

Test Locations can be linked to a user to determine whether they are allowed to perform a test at this location. The user can see only the properties that are linked to their assigned test locations.

To link a test location to a user

1. Choose the icon, enter User Test Locations, and then choose the related link.
2. Choose the New action.
3. In the User ID field, select the relevant user.
4. In the Test Location Code field, select the relevant test location for this user.

Test Location Assignment

You can assign one or more Test Locations to a Test Plan Property, one of which can be marked as *Standard*. This one is copied to the Test Order Property directly.

The complete table is copied to the Test Order Properties. The Test Order Locations can be used to filter the Properties to be tested in different places with different tasks.

See Also

Test Plans

Operator-Centric Recording of Quality Measurements

Feedback

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QA Permissions

QA permissions specify the authorizations for the execution of Good Manufacturing Practice (GMP)-critical functions, such as the changing of lot data, the release of test orders, or the release of production orders. Each of these activities can be cleared or blocked for a certain user (User ID) or a role (Role ID).

To set up Quality Assurance permissions

1. Choose the icon, enter QA Permissions, and then choose the related link.
2. Choose the New action.
3. In the Action Type field, enter the type of lot data change that can occur, including Status, Expiration Date, Entry Date, External Lot Number, Quarantine Date, Retest Date, and Warranty Date.
   Furthermore, authorizations can be defined for the change of Lot Number and Serial Number; the release of a Test Order; the release of a Production Order; and the certification of a Stability Test.
4. In the User ID field, enter the user for which this data record is validated. If this field is empty, the setting applies to all user.
5. In the Role ID field, enter the role for which this data record is validated. If this field is empty, the setting applies to all roles.
6. In the Item No. field, enter the item for which this data record is validated.
7. In the Variant Code field, depending on the item, enter the item variant for which this data record is validated.
8. In the Item Category Code field, enter an item category for which this data record is validated.
9. In the From Status / To Status field, define what status changes can be executed if the Activity Type field is set to *Status Change*.
10. Select the Allowed checkbox if the specified changes can be executed in the data record.
11. Go to the next line to add another QA permission.

See Also

Modify Lot- and Serial Number Data

Feedback

Submit feedback for this page .

Lot-/Serial No. Status

In the Lot-/Serial No. Status page, several statuses can be created, which can then be assigned to a lot- or serial number. In addition to simply creating statuses, different use restrictions can be determined per status and up to ten statuses can be selected for display on the Item Card and the Inventory List pages.

To create lot-/serial number statuses

1. Choose the icon, enter Lot-/Serial No. Status, and then choose the related link.
2. Choose the New action.
3. In the Code and Description fields, enter a unique code and brief description for the status.
4. Fill in or update the remaining fields based on the descriptions below.

Status Type

Identifies how the status is used and controls the meaning of the Customer Filter and Country Filter fields. The options are:

- *Released* – The lot is automatically released for all material movements. No entries can be made in the Customer Filter and Country Filter fields.
- *Blocked* – The lot is automatically blocked for all material movements. No entries can be made in the Customer Filter and Country Filter fields.
- *Conditionally Released* – at least one filter must be set in one of the following fields: Customer Filter or Country Filter. The chosen settings are checked in Sales.

When the *Released* or *Blocked* option is selected, certain fields for the data record are automatically pre-determined.

Pick - Sales / Pick - Manufacturing / Pick - Assembly / Pick - Transfer

If selected, the respective status is allowed for the sales picking, manufacturing picking, assembly picking, or transfer order picking. If not selected, inventory with this status cannot be picked in sales, manufacturing, or transfer orders. In addition, this inventory is not taken into consideration for the automatic proposal of lot- or serial numbers in the picking order.

This also applies for the Picks as well as the Inventory Picks in Microsoft Dynamics 365 Business Central.

Customer Filter

Customer that the status relates to. The filter entered here is considered at the following places within the application:

- Planning – Inventory that was released for certain customers is only considered for the fulfillment of demand of orders by these customers. For all other customers, this inventory is considered as not available in planning.
- Picking – Inventory that was released for certain customers is only used in the picking order if the respective sales order was created for this customer.
- Item Availability Check in the Sales Order – When item availability is checked in the Sales Order, only inventory where the deposited customer filter on the status matches the customer number in the sales header is viewed as available. Inventory where the customer filter of the status does not match the customer in the sales header cannot be entered in the item tracking line.

Furthermore, the shipment posting is denied if the customer filter of the status does not match the customer number in the sales header (such as if the status were altered after entering the item tracking line).

Country Filter

Country that this status relates to. The filter entered here is considered at the following places within the application:

- Planning – Inventory that was released for a certain country is only considered for the fulfillment of demand of orders by customers where the country code of the customer matches the country code of the status. For all other sales- or blanket orders this inventory is considered as not available in planning.
- Picking – Inventory that was released for certain countries is only used in the picking order if the country code of the customer in the sales order matches the country code in the status.
- Item Availability check in the Sales Order – When item availability is checked in the Sales Order, only inventory where the deposited country code filter at the status matches the country code of the customer in the sales header is viewed as available. Inventory where the country code filter of the status does not match country code of the customer in the sales header cannot be entered in the item tracking line.

Furthermore, the shipment posting is denied if the country code filter of the status does not match the country code of the customer in the sales header (such as if the status were altered after entering the item tracking line).

Prod. Rel. Comp. Check

If selected – and the status of a manufactured lot- or serial number is changed to this status – a check is done to determine if the lot statuses of the consumed lots are permitted for the alteration of the status of the manufactured lot.

The definition which lot statuses of the consumed lots are permitted is based on the Allowed at Prod. Rel. Comp. Check field.

> **Note**
> **Items with the Skip Component Release Check toggle turned on in the Item Card are skipped during this verification process.**

Allowed at Prod. Rel. Comp. Check

If selected, the respective lot status at the Prod. Rel. Comp. Check field is permitted and thus the lot status change of the manufactured lot is allowed.

> **Important**
> **Ensure that this status is set up as an allowed posting for the consumption posting in the Inventory Posting Permissions page.**

Reorder Point

If selected, inventory with this status is taken into consideration in the Microsoft Dynamics 365 Business Central planning for the fulfillment of a defined reorder point on the Item Card.

Safety Stock

If selected, inventory with this status is taken into consideration in the Microsoft Dynamics 365 Business Central planning for the fulfillment of a defined safety stock on the Item Card.

Test Order Check

If selected – and the status is changed to this status – a check is done to determine whether an open Test Order (status other than *Finished*) for this lot- or serial number exists. If an open Test Order exists, the action will be interrupted.

Available

If selected, inventory with this status is viewed as available in the Microsoft Dynamics 365 Business Central planning. This field is also taken into consideration during the availability check in the item availability pages.

If the Lot-/Serial No. Status of an Item Ledger Entry is set to a status where Available = *false*, all reservations from and to the item ledger entry are deleted as well as any related

Item Tracking Entries. This is valid if the Item Ledger Entry is posted with an initial status or if the status is changed in the Lot-/Serial No. Administration page.

Run the Update existing ILE function after changing any status that is already used in the Item Ledger Entries.

Exprd. Invt. avail. for Plng.

If selected, inventory with this status where the expiration date is passed is viewed as available in the Microsoft Dynamics 365 Business Central planning.

Pick expir. Inv. - Sales / Pick expir. Inv. - Manuf. / Pick expir. Inv. - Assem. / Pick expir. Inv. - Transfer

If selected, expired lots with this status can be selected in the pick document for sales orders, production orders, assembly orders, or transfer orders.

Show in Inv. List / Item Card

If selected, the available inventory for the status is shown in the Inventory List page and on the QA FastTab of the Item Card. Furthermore, the selected statuses are displayed in the Item Details - Inventory FactBox on the Sales Order and Prod. Order Components pages.

> **Note**
>
> **This checkbox can be selected on a maximum of ten statuses.**

Color Code

Indicates a color to provide status visualization to either the entire line or only the Status (Lot/SN) field on the following pages:

- Lot-/Serial No. Administration – entire line except the New Status (Lot/SN) field will show the relevant status color until the change is posted
- Inventory Overview – entire line
- Item Tracing – Status (Lot/SN) field only
- Lot/Serial No. Information Card – Status (Lot/SN) field only

For more information, see Color Codes.

Inspection Result

Specifies the value of the requested inspection result of the Lot-/Serial No. Status when automated test decisions are used. The option corresponds to the inspection result in the Test Orders:

- Accepted = *Items are OK* in Test Order
- Denied = *Items are not OK* in Test Order
- Unspecified = *Unspecified* in Test Order

For more information, see Automated Test Decision.

Print Certificate

Determines if it is accepted to print a customer certificate. True = Customer Certificate can be printed in Sales order or Warehouse Shipment. By default, value = True. Customer Certificate cannot be printed for a lot where Print Certificate is false.

For more information, see Print Customer Certificate.

Update Existing Item Ledger Entries

Use the Update existing ILE action to update all existing Item Ledger Entries with the current Lot-/Serial No. Statuses. This should be run after changes are made to any of the settings, specifically after the value of the Available field is changed for any status that is already used in the Item Ledger Entries or if a status is deleted.

Note

Running this process can take a while if there are a lot of Item Ledger Entries.

Feedback

Submit feedback for this page .

Inventory Posting Permissions

For the ability to create posting responsibility lot- or serial number assignments (by entering an item tracking line or a reservation) it is necessary to complete setup in the Inventory Posting Permissions page. Blank fields indicate that there are no restrictions on posting authorizations. If a line does not specify any role or user, the setting is valid for all users.

To set up inventory posting permissions

1. Choose the icon, enter Inventory Posting Permissions, and then choose the related link.
2. Choose the New action.
3. Fill in or update the remaining fields based on the descriptions below.

Posting Allowed

If selected, this data record is about permission or restriction. It specifies, for example, if a user or role is allowed to execute a posting or not.

Item Tracking Assignment Allowed

In contrast to the Posting Allowed field, this field determines if the creation of an Item Tracking line or the execution of a reservation is allowed. This means – that with the Posting Allowed and Item Tracking Assignment Allowed fields – a two-stage check can be set up:

1. Item Tracking Assignment Allowed – determines whether a lot- or serial number assignment is permitted for the selected conditions.
2. Posting Allowed – determines which restrictions apply to the posting of a material movement.

Entry Type

Determines for which entry type (document type) restrictions are valid. The options are:

- Purchase (Order, Invoice, Credit Memo, Return Order, Warehouse Receipt)
- Sale (Order, Invoice, Credit Memo, Return Order, Warehouse Shipment)
- Positive Adjmt. (Item Journal, Warehouse Item Journal, Physical Inventory, etc.)
- Negative Adjmt. (Item Journal, Warehouse Item Journal, Physical Inventory, etc.)
- Transfer (Picking, Put-away, Item Reclassification Journal, Transfer Order)
- Consumption (Consumption Journal, Production Journal)
- Output (Output Journal, Production Journal)
- Whse. Transfer (Bin transfers – Picking, Put-away, Item Reclassification Journal)

If this field is left blank, then the record is applicable for all entry types unless the settings are overruled by a record using a more detailed filtering.

Action Type

Specifies if the record is about an inbound or an outbound material movement. Inbound material movements always describe a positive adjustment whereas outbound material movements describe a negative adjustment (for example, *Purchase - Outbound = Purchase credit memo; Purchase - Inbound = Receipt*).

Lot-/Serial No. Status

Limits the posting responsibility assignment of lot- or serial numbers to a certain lot- or serial number status. Each status defined in the Lot-/Serial No. Status page are available.

Item No. / Variant Code / Item Category Code

Identifies an item, item variant, or item category for which a posting authorization is required. For example, it can be set that a certain user is not authorized to post this item, item variant, or item category.

Location Code

Identifies location-specific restrictions and thus prevents or allows material movements to a certain location. For example, it can be set that a lot- or serial number with the status *Blocked* cannot be posted to the picking location.

Filter on Component Tracking

In standard Business Central, all Reservation Entries are copied to the component lines when the Production Journal is opened. In COSMO Quality Assurance, inventory posting permissions are defined to prevent the automatic item tracking assignment of lot- or serial numbers.

With the Filter on Component Tracking setting, you can choose whether a lot- or serial number can be transferred to a Production Journal line for automatic assignment based on its Lot-/Serial No. Status. If this status has been defined with the Filter on Component Tracking checkbox selected, the originally copied Reservation Entry will be deleted from the Production Journal line, thus, preventing the automatic assignment of the lot- or serial number to a component. This ensures that unavailable lot- or serial numbers are by-passed to allow proper output posting.

To enable this feature:

- The Filter on Component Tracking checkbox can only be selected for lines with Entry Type = *<blank>* or *Consumption*.
- The Item Tracking Assignment Allowed and Filter on Component Tracking checkboxes cannot be selected on the same line.
- You must link the record to the Lot-/Serial No. Status that has to be omitted in the Item Tracking lines for the component in the Production Journal. For example:

Posting Allowed	Item Tracking Assignment Allowed	Entry Type	Action Type	Lot-/Serial No. Status	Item No.	Filter on Component Tracking
Yes	Yes					
		Consumption	Outbound	QUARANTINE	SP-BOM2000	Yes

Zone Code

If locations are used that have the Directed Put away and Pick toggle turned on in the Location Card and thus zones can be entered for this location, a permission or restriction for the posting or assignment of lot- or serial numbers can be set up for certain zones.

Bin Code

If a warehouse is handled in bins, postings to a certain bin code can be restricted. Furthermore, a bin can be excluded from postings.

For example, it can be set that a lot- or serial no. with the status *Blocked* is only to be posted to the quarantine bin. It can also be set that blocked material must not be transferred to Manufacturing.

Role ID / User ID

Identifies a specific role or user that the stated specifications apply to. If no specific role and user is assigned, this authorization applies for all users.

Inventory Posting Permissions Setup - System Checks

In the Inventory Posting Permissions page, define users and roles (groups of users) for lot- or serial number-related postings and specify their posting authorizations in detail. The system checks of these posting authorizations are described for single and multiple data records.

System Checks – Single Data Record

If a user executes a posting or assigns a lot- or serial number, all actions that the role or user is permitted to execute are checked. Restrictions can be defined on several levels of detail. The settings are checked according to the following order, whereby the filters are set with "field content and/or blank" (for example, 4711|"):

Field	Level
User ID	1
Role ID	2
Variant Code	3
Item No.	4

Field	Level
Item Category Code	5
Bin Code	6
Zone Code	7
Location Code	8
Lot-/Serial No. Status	9
Action Type	10
Entry Type	11

Examples

1. User "WS" tries to post an inbound lot on location code BLUE. During the authorization check on level 1, the system finds a data record in the setup table. As a result, user "WS" is not permitted to execute lot postings on location BLUE. The transaction will be cancelled with an according error message.
2. User "COSMO" tries to post a lot of the item category Raw Materials to warehouse bin S-08-0003 in warehouse location SILVER. During the authorization check on level 5, the system finds a data record in the setup table. As a result, user "COSMO" is permitted to post the respective item on bin S-08-0003 in location SILVER. The posting can be executed without issue.
3. User "COSMO" tries to post an Outbound Consumption for a lot with the status Blocked. During the authorization check, the system does not find an appropriate data record within the table. As a result, the posting is interpreted as not permitted and cancelled with an according error message.

System Checks – Multiple Data Records

If several data records are detected after setting all filter options according to the recent posting activity, points are given that correspond to the priorities. The data record with the maximum number of points is the accurate one for this posting activity.

Example

The following data records of the Inventory Posting Permissions setup remain after setting all filters:

User	Role	Variant	Item No.	Item Category	Location	Zone	Bin	Lot-/Serial No. Status	Action Type	Entry Type
									Inbound	Purchase

User	Role	Variant	Item No.	Item Category	Location	Zone	Bin	Lot-/Serial No. Status	Action Type	Entry Type
COSMO			4711						Inbound	Purchase
COSMO									Inbound	Purchase
			4711						Inbound	Purchase

After the allocation of points is carried out, every filled field gets a "1" and every blank field gets a "0". The result is:

Line	Score
1	00000000011
2	10010000011
3	10000000011
4	00010000011

The data record in line 2 (with the highest score) is the crucial one to permit or decline the posting.

Feedback

Submit feedback for this page .

Color Codes

Color Codes are used to provide lot-/serial number status visualization in a variety of pages.

To set up color codes

1. Choose the icon, enter Color Codes, and then choose the related link.
2. Choose the New action.
3. In the Code and Description fields, enter a unique code and brief description for the color code.
4. In the Color Name field, select the relevant color of the status information to which the code is assigned. The options are *black*, *blue*, *red* [italicized], *green* [bolded], and *yellow*.
5. Select the Bold checkbox to bold the color of the status information to which the code is assigned.

> **Note**
> **The Bold checkbox cannot be selected on Color Name = *yellow* (never bolded) or *green* (always bolded).**

See Also

Lot-/Serial No. Status

Feedback

Submit feedback for this page .

Customer Item Specifications

Customer Item Specifications are used to define a customer and item/item category combination to be used with item tracking. With the From The Same Lot field, it is possible to limit the selection of lots in the Item Tracking Lines page to the same lot only.

In addition to Tell Me, the Customer Item Specifications page is accessible from the:

- Item Card, Actions menu > Quality Assurance
- Items list, Actions menu > Functions > Quality Assurance
- Customer Card, Related menu > Customer
- Customers list, Related menu > Sales
- Item Categories, Actions menu

In the Customer Item Specifications page, enter the combination of Customer with Item Category/Item, and then select the From The Same Lot checkbox if lots for this combination should always be selected from the same lot.

Later in the Item Tracking Lines page, an error opens when two different lots are entered for this customer/item combination.

The From the same Lot field is also accessible on the sales order line, which allows you to override the setting so that you can select from multiple lots per sales order.

> **Note**
> **This function does not apply to the Suggest Lots function (see Lot Suggestion).**

Feedback

Submit feedback for this page .

DIN ISO 2859 - Part 1

The procedure of DIN ISO 2859 - Part 1 only applies to those test properties that have been allocated to a Test Property Set with the testing method of Counting (AQL).

The different setup pages are described in this section. Choose the icon, enter the setup page, and then choose the related link.

Allowed AQL Values

In the Allowed AQL Values page, the Acceptance Quality Level (AQL) values to be applied must be defined according to the requirements of the supplier and the receiver. The AQL logic is only to be used for component testing.

The values in this page are automatically transferred to the Sample Instruction Setup page.

Evaluation Levels

In the Evaluation Levels page, users can define the various evaluation levels that form the basis of the Sample Instruction Setup page.

Inspection Levels

By means of various inspection levels, the key letters for the sample size are allocated to a certain lot size (see Sample Size for Inspection Level). According to DIN ISO 2859 - Part 1, section 10.1 "Inspection Level", inspection level II must be used if nothing else has been specified.

Sample Size for Inspection Level

In the Sample Size/Inspection Level page, users can select the appropriate inspection level and then assign Key Letters for the sample size to the according lot size interval.

This page is accessed by choosing the Card action on the Inspection Levels page.

Sample Instruction for Evaluation Level

In the Sample Instruction Setups page, choose the View action to open the Sample Instruction Setup page for the selected Evaluation Level.

The fields on the Lines FastTab are described in the following table.

Field	Description
Key Letter	Manual setup of the key letter for the sample size from the Sample Size/Inspection Level page.
Sample Size	Based on the AQL Values and the Key Letter for the sample size, the sample size must be gathered from the Sample Instruction of DIN ISO 2859 - Part 1.
AQL Values	Based on the values specified in the Allowed AQL Values page.

The values in the matrix display the maximum allowable acceptance limits depending on the sample size and the defined AQL Values. Thus, the allowable acceptance number indicates how many error parts the sample is allowed to contain so that the tested quantity (= shipped quantity) is still accepted.

Inspection Severities

The switching rules between the various evaluation levels of items to be tested (simultaneously considering the vendor) are defined in the Inspection Severity page.

The Inspection Severities page displays all existing inspection severities. To open the Inspection Severity page, select the relevant line and then choose the Edit or View action on the Manage menu.

The respective current evaluation level / test number of an upcoming test order for an item is entered into the Test Status page (Item Card > Quality Assurance > Test Status) based on the result of the test order and the determined value of this page.

The fields in this page are described in the following table.

Field	Description
Current Test Type	The current evaluation level (linked to the Current Test No.) that the item is tested with in the test order.
Current Test No.	The current test number which specifies the Current Test Type.
Next Test Type when OK	Indicates the next evaluation level (in connection with the next test number) if the testing has been classified as OK.
Next Test No. when OK	Indicates the next test number (in connection with the next evaluation level) if the testing has been classified as OK.

Field	Description
Next Test Type when not OK	Indicates the next evaluation level (in connection with the next test number) if the testing has not been classified as OK.
Next Test No. when not OK	Indicates the next test number (in connection with the next evaluation level) if the testing has not been classified as OK.
Description	Description of the respective line.
Default	If an item has not been tested yet, the evaluation level with this checkbox selected is automatically used (usually, this is the Normal 1 inspection type).
No Testing	If selected, the testing of the related line will be skipped (Skip-Lot-Logic) and no test order will be created automatically.

See Also

Test Property Set
Test Plan Assignment on Items and Item Variants

Feedback

Submit feedback for this page .

Error Catalog

The Error Catalog provides the ability to assign error codes to a failed value recording of measurement tests. Each setup page is described in the following sections.

Error Types

Error Types explain the kind of error that occurred.

Error Causes

Error Causes explain why the error occurred.

Error Actions

Error Actions indicate what action must be taken to address the error.

Error Categories

Error Categories classify the intensity of the error.

Errors

In the Errors page, the various error settings are combined to create the error catalog, which can be used during the Value Recording process.

In the QM Value Recording page, the Error Code field is shown only for measuring tests; in the Test Order/Value Recording Card page, an Error Code can only be entered on measuring test lines.

See Also

Process a Test Order
Test Order/Value Recording Card

Feedback

Submit feedback for this page .

Additional Setup

This section describes the COSMO Quality Assurance-related setup fields and functions in standard Microsoft Dynamics 365 Business Central pages.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Learn about the COSMO Quality Assurance fields and actions on the Item Card.	Item Card
Learn about the COSMO Quality Assurance fields in the User Setup page.	User Setup
Learn about the COSMO Quality Assurance fields on the Item Tracking page.	Item Tracing

See Also

Setup

Feedback

Submit feedback for this page .

Item Card

Lot creation and test-related values are defined on the Item Card; most are described in more detail throughout this training material. This section highlights the significant additions.

Item Tracking FastTab

The fields on the Item Tracking FastTab are described in the following table.

Field	Description
Retest Calculation	Formula of the Retest Date; based on work date unless Expiration Date is entered then calculated from the expiration date.
Quarantine Calculation	Formula for the Quarantine Date; based on work date. The quarantine function defines the period of time from Entry Date to Quarantine Date where inventory is not available for inventory postings. It will not be visualized as on hand inventory in this period.
Automatic Lot No. Creation	Determines if the lot number is created automatically from the number series with the creation of the production order of the item.
Autom. Create Lot No. at Status	Indicates the status of the production order at which the automatic lot number creation should occur. The options are: - *Firm Planned*: When creating a production order with the status Firm Planned. - *Released*: When creating a production order with the status Released.
Skip Component Release Check	If the Prod. Rel. Comp. Check toggle is turned on in the Lot-/Serial No. Status page, then during output posting, the system will check if item-tracked components are released completely. For some items, it may not be necessary to verify all item-tracking lines. To skip the verification for this item, turn on the Skip Component Release Check toggle.
Keep Original Lot No.	Determines if the creation of a new lot number is prevented when using the "Automatic Lot No. Creation" function. - If the toggle is turned on, then the same lot number from previous output is used when no item tracking is entered. - If the toggle is turned off, then a new lot number is created from the lot number No. Series assigned to the item.

QA FastTab

The fields on the QA FastTab are described in the following table.

Field	Description
Long-Term Storage Condition Code	Indicates an inventory condition for storing the item long-term. For more information, see Inventory Conditions.
Inventory (Expired)	Displays the quantity of inventory that has expired. Choose the value to open the Inventory Overview page for further details (see Inventory Overview).
Inventory (XX)	Displays the inventory per status for all statuses that have the Show in Inv. List / Item Card checkbox selected in the Lot-/Serial No. Status page. For space reasons, the number of the viewable status-dependent inventory is limited to a maximum of ten.

Home Menu

The actions on the Home menu are described in the following table.

Action	Description
Copy Item	Opens the Copy Item page, where you can create an item from an existing item. In the Options FastTab, either enter a target item number or a number from a number series is produced automatically. In the Quality Assurance FastTab, you can choose to copy the Item Test Plan Assignment and/or the Customer Item Specification information, along with any other selected area, from the source item to the new item.
Apply Template	Applies an item template to a new item using the standard item template functionality. The Item Template page includes some default settings for COSMO Quality Assurance. To adjust the default settings in an Item Template, you can use the Tell Me feature or open the template from the Item Card.

Quality Assurance Menu

The actions on the Quality Assurance menu are described in the following table.

Action	Description

Action	Description
Test Plan Assignment	Opens the Test Plan Assignment page, in which you can assign Test Plans for the item to different Source Types (such as Sales Order, Production Order and so on). Users are also able to enter vendor-specific or customer-specific test plans. For more information, see Test Plan Assignment on Items and Item Variants.
Test Status	Opens the Test Status page, which displays the Current Test Type and the corresponding Current Test No. for the item and its respective vendor. This information is used for determining the Inspection Severity of the next test. This page is populated from the Inspection Severity page. It is based on the test result of the latest processed test order and the resulting evaluation level when finishing the test order.
Retain Sample Instruction	If you have the integration with Advanced Manufacturing Suite (AMS), this action is available. For more information, see Retained Samples.

Actions Menu

The actions on the Actions menu are described in the following table.

Menu	Action	Description
Functions	Templates	Opens the Item Templates list that contains the default settings for new items based on different item criteria. The Item Template page includes a Quality Assurance FastTab with default settings for some of the fields on the Item Tracking and QA FastTabs. Additionally, an existing item with needed settings can be set as a template by choosing Functions > Save as Template.
Quality Assurance	Customer Item Specifications	Opens the Customer Item Specification page in which you can limit the selection of lots in the Item Tracking Lines page to only the same lot for a specific combination of customer and item/item category. For more information, see Customer Item Specifications.

Feedback

Submit feedback for this page .

User Setup

In the User Setup page, define which responsibility center(s) is to be allocated to a user, a language code for test properties/test property set translations in the Test Orders, and the ability to change the Inspection Result in a Test Order. Choose the icon, enter User Setup, and then choose the related link.

Responsibility Centers

The responsibility centers in COSMO Quality Assurance have been extended in the Manufacturing and COSMO Quality Assurance areas.

The code of the responsibility center(s) to allocate to a user is entered in the respective fields.

Once set up, the user is only permitted to view manufacturing documents of the responsibility center that is entered in the filter. This responsibility center will also be the standard responsibility center when creating new production documents.

Field	Description
Manuf. Resp. Ctr. Filter	A filter entered here will automatically be entered when BOMs are created and automatically taken over at the calculation of a Production Order. If a Manufacturing Responsibility Center is assigned to a user, they will only be able to view the BOMs and Production Orders that have no or exactly the Responsibility Center entered for the user.
QA Resp. Ctr. Filter	A filter entered here will automatically be entered at the creation of Test Plans and automatically taken over at the creation of a Test Order. If a QA Responsibility Center is assigned to a user, they will only be able to view the Test Plans and Test Orders that have no or exactly the Responsibility Center entered for the user.

Other QA Fields

The QA Language Code field allows translated test properties and test property sets to be shown in the user's language in the Test Order and related reports. For more information, see Translations in Test Orders.

The Update Inspection Result field allows designated users the ability to change the Inspection Result on a Test Order. For more information, see Unspecified Inspection Result on Test Order.

Feedback

Submit feedback for this page .

Item Tracking

COSMO Quality Assurance offers lot- and serial number tracking, which guarantees a monitoring of the whole production process from the goods receipt to the final product.

Item Tracking Setup

The Item Tracking Card is used to indicate item-dependent inspections for the processing of serial- and lot numbers. Each FastTab refers to certain aspects of the item tracking such as serial numbers and lot numbers, respectively. The settings made on the Item Tracking Card will be used each time an item with the respective code is moved within the application.

The Item Tracking Codes can be accessed using Tell Me. Choose the icon, enter Item Tracking Codes, and then choose the related link. In the Item Tracking Codes page, choose the New action to create an item tracking code or the Edit action to open an existing item tracking code.

The Initial Status field defines the initial status of the lot or serial number, such as the status that is allocated to a new lot- or serial number.

To ensure an integrated lot tracking, turn on all toggles on the Serial No. or Lot No. FastTabs.

Transfer Comments on Rename

To keep information about lot- serial numbers with the inventory, existing comments can be transferred when a new lot- or serial number is created through rename or split in the Lot-/Serial No. Administration page. The way in which comments are transferred to the Lot- or Serial No. Information Card is determined by the options in the Transfer Comments on Rename field on the Misc. FastTab of the Item Tracking Code Card page.

Options

The options in the Transfer Comments on Rename field are described in the following table.

Option	Description
<Blank>	Existing comments – or new comments added during posting – are not transferred to the new Lot- or Serial No. Information Card; both stay on original information card.

Option	Description
Copy	Existing comments are copied to the new Lot- or Serial No. Information Card and remain on the original information card.
Move	Existing comments are moved to the new Lot- or Serial No. Information Card and are removed from the original information card.
Copy+New	Existing comments are copied to the new Lot- or Serial No. Information Card. New comment(s) is not transferred to new information card; it remains on the original information card with existing comments.
Move+New	Existing comments are moved to new Lot- or Serial No. Information Card. New comment(s) is not transferred to the new information card; it remains as the only comment on the original information card.

See Also

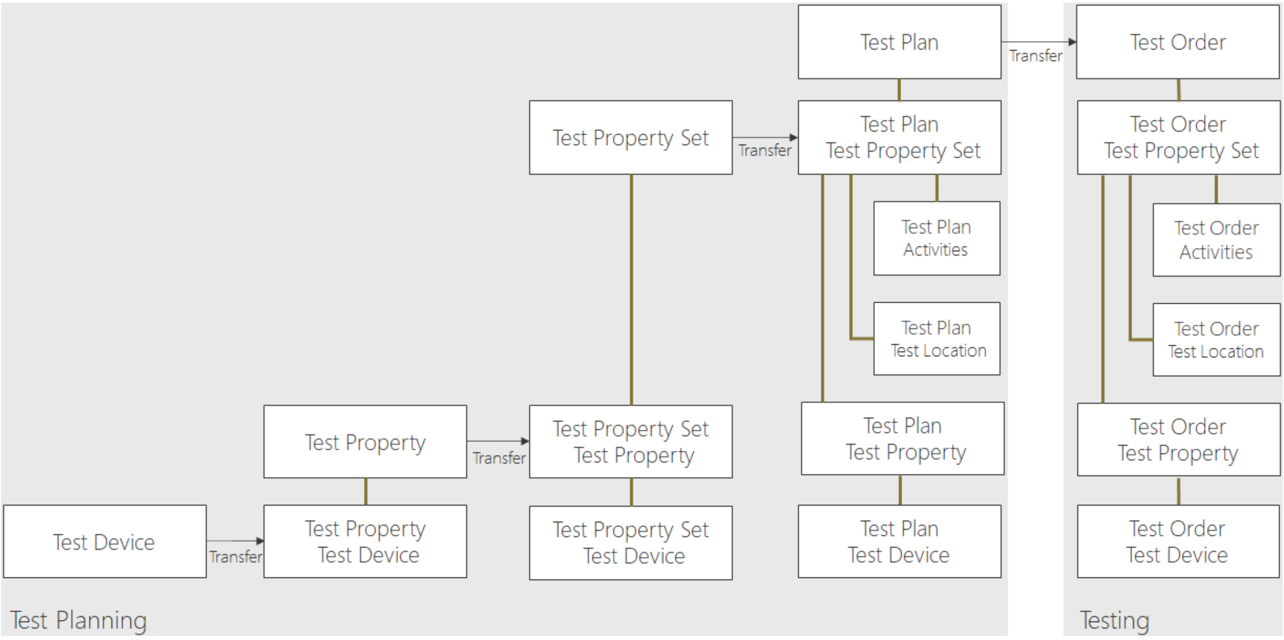
Lot-/Serial No. Status
Lot-/Serial No. Administration

Feedback

Submit feedback for this page .

Test Planning

Test orders are the result of the Test Plans compiled from the master data test devices, test property, and test property set. The following graphic illustrates how the data is transferred between tables from test planning to execution. The gold lines represent the relationship between the tables.



In this section, the setup of each test planning area is described. Each setup page is accessed using Tell Me. Choose the icon, enter the page name, and then choose the related link.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Define the tools that a quality assurance employee requires in order to run a test.	Test Devices
Set up the characteristics of an item or raw material that is to be tested.	Test Properties
Summarize a set of inspection criteria.	Test Property Set
Create the templates for a test order to be carried out during or after the item/lot has been received on stock and has gone into quarantine.	Test Plans

To	See
Define the test plans for testing items and item variants.	Test Plan Assignment on Items and Item Variants
Update test plans based on changes to test plan properties and test plan property sets.	Mass Update of Test Plans
Add multilingual capabilities to the test properties/test property sets in the testing process.	Test Property Translations
Attach documents to test plans, test orders, test incidents, and sample occurrences.	Document Storage

Feedback

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Test Devices

Test devices are defined as all kinds of tools that a quality assurance employee requires in order to run a test (such as scales, photometer, hardness- or thickness tachymeter, and so on).

Test Device Groups are used to classify Test Devices and can be set up prior to or as needed when creating test devices.

To set up test device groups

1. Choose the icon, enter Test Device Groups, and then choose the related link.
2. Choose the New action.
3. In the Code and Description fields, enter a unique code and description for the test device group.
4. Go to the next line and add another test device group.

To set up test devices

On the Test Device Card, the master data of the test device that will be used to determine the actual values of the test properties is maintained.

1. Choose the icon, enter Test Devices, and then choose the related link.
2. Choose the New action.
3. Fill in or update the fields as described in the following tables.

General FastTab

The fields on the General FastTab are described in the following table.

Field	Description
No.	Unique identifier from the number series or manually entered if manual numbering is allowed.
Description	Description by which the test device is to be managed (scales, measure, etc.) within COSMO Quality Assurance.
Responsible	For every test device, a certain employee can be defined who is responsible for the proper use and maintenance of the device. Use the drop-down arrow to access the Users page.

Field	Description
Status	Indicates if a test device is released for processing tests or if it is blocked. Newly created test devices always have the status *Certified* whereas the status can be changed manually. The Status and Blocking Reason fields are automatically updated when the Block Test Devices batch job is run (see Block Test Devices).
Blocking Reason	Reason that the test device has been blocked.
Department	Assigns the test device to a certain department, such as workshop, laboratory, and so on.
Substitute Test Device	Turn on to indicate that the test device should be substituted with a new test device soon or can be used as a substitute for another test device. This field is used for informational purposes only.
Date of First Release	The first release date of a test device, used for determining the age of the device.

Testing FastTab

The fields on the Testing FastTab display testing information.

Field	Description
Test Cycle	Frequency in which the test device should be tested.
Last Test Date / Next Date Test Required	The formula from the Test Cycle field is used to calculate the date in the Next Date Test Required field, which is based on the date in the Last Test Date field. If the date of the next test required has expired, the test device can be blocked using the Block Test Devices batch job and thus become subject of a test (see Block Test Devices).
Default Test Plan No.	Standard test plan according to which the test device should be tested. *NOTE: This field must be populated to use the Create Test Order function on the Block Test Devices batch job (see Block Test Devices).*
Test Order Exist	Indicates if an active test order exists for the test device. This field will be set to *Yes* if a test order has been created by running the Block Test Devices batch job (see Block Test Devices).
Last Tester	Automatically populated with the ID of the user who finishes or cancels a test order.

Item FastTab

The fields on the Item FastTab are used for informational purposes only.

Field	Description
Vendor No.	Vendor from where the test device was purchased.
Vendor Name	Populated from the Name field of the vendor selected in the Vendor No. field.
Lot No.	Lot number of the test device.
Serial No.	Serial number of the test device.
Purchase Price	Purchase price of the test device.
Connection to-Item No.	Connection of the test device to an inventory item.
Connection to-Item Description	Populated from the Description field from the item selected in the Connection to-Item No. field.
Warranty Date	Warranty date of the test device.
Inventory No.	Inventory number of the test device.

Others FastTab

The Others FastTab contains additional test device information.

Field	Description
Read off Precision	Value until which a reading can be specified.
Read off Unit	Unit of measure of the Read off Precision.
Working Range	Maximum available working range.
Manufacturer	Manufacturer of a test device.
Selfmade	Indicates if the device has been produced internally.
State	Indicates the state of the test device.
Certificate	Document path to an internal or external certificate. This document can be accessed by choosing the Display Certificate action on the Home menu.
Test Device Group	Opens the Test Device Group list, used to classify test devices.
Creation Date / Created by / Last Date Modified / Last Modified by	Test device modification information. These values are automatically determined based on the current date and the active User ID and are non-editable.

Home/Reports Menus

The actions on the Home and Reports menus are described in the following table.

Menu	Action	Description
Home	Test Orders	Opens the Test Order List page, which displays all test orders that have been created for this test device.
	Display Certificate	Opens the document that has been entered in the Certificate field on the Others FastTab.
	Create Test Order	Creates an instant test order for the test device (see Instant Testing).
	Block Test Device	Opens the Block Test Devices batch job (see Block Test Devices).
	Internal Comments / External Comments	Comments can be used to add notes and remarks about a test device. - Internal comments are printed on documents that will not leave the company such as test plans. - External comments will be shown on documents that can be sent to the customer or vendor.
Reports	Test Device List	Generates the Test Device List report for preview or printing.

Instant Testing

A test order can be created for the instant testing of a test device by choosing the Create Test Order action on the Home menu in the Test Device Card or Test Devices page. The following events occur when the Create Test Order function is run:

- The Test Device Card page is updated with the Status to *Blocked* and the Blocking Reason to *Instant Testing*.
- The Test Order/Value Recording Card page opens with the Status set to *Value Recording* for instant testing.

> **Note**
> **A Default Test Plan must be specified on the Test Device Card to create an instant test order.**

The Status on the Test Device is reset to *Certified* when the test is finished with an Inspection Result of *Items are OK* and the Blocking Reason field is cleared. Additionally, the Last Tester field is populated with the ID of the user who finished the test order and the Last Test Date field is updated accordingly.

Block Test Devices

Test devices are subject to the test cycles specified on the Test Device Card (see Testing FastTab). The Block Test Devices batch job blocks test devices that are out of use or create test orders for test devices that need to be calibrated. This batch job is accessed from the Home menu of the Test Device Card page or Tell Me. Choose the icon, enter Block Test Devices, and then choose the related link.

On the Options FastTab, it is possible to enter a reason for blocking the test device, which is then transferred to the Blocking Reason field on the corresponding Test Device Card. Turn on the Create Test Order toggle to automatically create a test order for all newly blocked test devices.

Note

A Default Test Plan must be specified on the Test Device Card to create a test order.

In the Test Device FastTab, a date interval can be specified. If the date in the Next Date Test Required field on the Test Device Card is within this date interval, a test order will be created for the test device if the Create Test Order toggle is turned on.

Caution

If a date is not entered in the Next Date Test Required field, all test devices are blocked after running this batch job.

The Block Test Devices function is filtered on the selected Test Device when run from the Test Device Card; therefore, only the selected test device(s) will be blocked.

Feedback

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Test Properties

A test property is the characteristic of an item or raw material that is to be tested (such as length, color, temperature, dropping point, or yes/no, works yes/no, meets specifications full/approximately/little/not).

To set up test properties

In the Test Property Card, the master data of the test properties is maintained and a link to the required test devices can be established.

1. Choose the icon, enter Test Properties, and then choose the related link.
2. Choose the New action.
3. Fill in or update the fields as described in the following tables.

General FastTab

The fields on the General FastTab are described in the following table.

Field	Description
Code	Unique identifier from the number series or manually entered if manual numbering is allowed.
Description	Description of the test property.
Result Type Code	Result type by which a test property is to be measured.
Unit of Measure Code	Unit of measure in which a test property is to be tested.
Expected Value	Specific value which will be used as an expected value in test orders. The expected value can be numeral as well as a text input (such as, OK/Defect). If the result type of a test property is set with an *Option* data type, the values of possible expected values can be entered in the Test Property Values page. *NOTE: It is not necessary to specify expected values for test properties on this level as this constricts the possible use of the test property (the test property master data is copied into the test property sets and subsequently into the test plan). Expected values for a test property should only be entered on a test plan level if you know which item the test plan will be allocated to and thus you know the exact expected values for the item.*

Field	Description
Expected Boolean Value	Indicates how the expected value with Result Type = *Boolean* is stored for comparison purposes without language constraints. This toggle is turned on automatically if the Expected Value is true (based on current language settings) and turned off automatically if the Expected Value is false (based on current language settings). Alternatively, turning this toggle on or off automatically sets the Expected Value to true/false based on current language settings. For example, Yes (English) / Ja (German) = on, or No (English) / Nein (German) = off. This field is not shown by default but can be added using the Personalize feature.
Upper Limit / Lower Limit	By entering an Upper Limit and a Lower Limit, users can specify that the result does not have to exactly match the Expected Value. If the result lies within the defined interval, the test will still be regarded as passed.
Test Method No.	Indicates how the test property should be tested in the customer certificate (see Test Methods).
Execute Test	Mainly used to indicate if the test property is to be used in tests. If turned off, the test property will not be tested in any test orders. If turned on, serves as the release of the test property.
Multiple Recording	Determines if multiple measured values can be entered for this test property during value recording (see Multiple Measurements).

Lines FastTab

On the Lines FastTab, one or more test devices can be allocated to the test property, which are necessary or compulsory for the inspection of the test property. Any number of test devices can be allocated to a test property, as well as any number of criteria can be allocated to one kind of test device.

In the No. field, enter the test device number; the Description field is automatically filled in with the description of the selected test device.

Contextual Details FastTab

The Contextual Details FastTab contains comment and text fields to assist with managing and viewing contextual information related to Quality Assurance tests.

Field	Description

Field	Description
Internal Comments	Indicates whether internal comments exist for the test property.
External Comments	Indicates whether external comments exist for the test property.
Test Property Short Text	Additional information about the text property with a 250 character limit. This information transfers to the Test Property Set, Test Plan, and Customer Certificate. Additionally, this text can be translated in the Extended Text field in the Test Translation page by choosing Property > Translations on the Related menu. For more information, see Test Properrty Translations.
Test Property Long Text	Additional information about the text property with a 2048 character limit. Text can be freely entered in the field or choose the ellipsis button to open the Text Editor, in which you can enter as much text as needed within the noted limit, which you can see via the character count at the bottom. This information transfers to the Test Property Set, Test Plan, and Customer Certificate. Additionally, this text can be translated in the Extended Text 2 field in the Test Translation page by choosing Property > Translations on the Related menu. For more information, see Test Property Translations.

Customer Certificate FastTab

The fields in the Customer Certificate FastTab refer to how the certificate should deal with the results or measurements for the test property. For more information, see Customer Certificate FastTab.

Miscellaneous FastTab

The fields on the Miscellaneous FastTab are described in the following table.

Field	Description
Output Internal	Determines if the test property is displayed on internal documents, such as test plans and test orders.
Output External	Determines if the test property is displayed on external documents, such as analysis certificates.
Creation Date / Created by / Last Date Modified / Last Modified by	Test property modification information. These values are automatically determined based on the current date and the active User ID and are non-editable.

Home/Reports Menus

The actions on the Home and Reports menus are described in the following table.

Menu	Action	Description
Home	Test Property Values	Opens the Test Property Values page, where the test result values for this test property are maintained.
	Update Test Plans	Opens the Update Test Plan Property request page, where changed test properties can be modified in all related or selected test plans in one mass update (see Mass Updates of Test Plans).
	Internal Comments / External Comments	Comments can be used to add notes and remarks about a test property. - Internal comments are printed on documents that will not leave the company such as test plans. - External comments will be shown on documents that can be sent to the customer or vendor. Whether comments exist is shown in the Contextual Details FastTab.
Reports	Test Property List	Generates the Test Property List report for preview or printing.

Related Menu

The Related menu contains the Translations action, which opens the Test Translation page, where translations for the Test Property can be defined for use on pages that are provided for Value Recording and on selected reports/documents (see Test Property Translations and Test Property and Test Property Sets).

Feedback

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Test Property Set

A variety of inspection criteria is summarized in the Test Property Set Card. For example, a "Measuring Testing" test property set could be created, in which the Length, Width, and Diameter inspection criteria are allocated and which are consulted to determine the measurement requirements of the item that is to be inspected.

To create a test property set

1. Choose the icon, enter Test Property Set, and then choose the related link.
2. Choose the New action.
3. In the Code and Description fields, enter a unique code and short description for the test property set.
4. In the Testing Method field, select the relevant method for the test property set. The options are:
   - Counting (AQL) – counting procedure (such as in the component inspection), for example, if the acceptance random inspection is applicable according to the number of faulty units or mistakes according to DIN ISO 2859 - part 1.
   - Measuring – measured actual values (for example, inner depth, drop point, number bacteria per colony and so on) are compared with the predetermined required system values.
5. On the Lines FastTab, enter the test criteria to be taken into consideration within a Test Property Set:
   - In the Test Property Code field, enter the test property number; all additional information from the Test Property is transferred to the line. Many of these fields can be changed as needed.
   - In the AQL Value fields, select the checkboxes according to which error type the test property is to be tested. Error types symbolize a decrease of the Inspection Severity. Increasing the AQL Values connected to the error type also increases the related acceptance numbers.
   - The Result Type Code, Expected Value, Output External, and Output Internal fields are editable to allow a test property to be modified in the test property set.
6. Choose Line > Test Device to open the Test Property Set Test Devices page where test devices can be assigned retroactively to the test property set. Alternatively, choose the value in the Test Device field to open the page.

Note

Fields not described here are used with the Customer Certificate feature. For more

> **information, see Test Property and Test Property Sets.**

Contextual Details FastTab

The fields on the Contextual Details FastTab are used to assist with managing and viewing contextual information related to Quality Assurance tests.

Field	Description
Internal Comments	Indicates whether internal comments exist for the test property.
External Comments	Indicates whether external comments exist for the test property.
Test Property Set Short Text	Additional information about the text property set with a 250 character limit. This information transfers to the Test Plan and Customer Certificate, in which it can be printed. For more information, see Test Property Sets. Additionally, this text can be translated in the Extended Text field in the Test Translation page by choosing Property Set > Translations on the Related menu. For more information, see Test Translations.
Test Property Set Long Text	Additional information about the text property set with a 2048 character limit. Text can be freely entered in the field or choose the ellipsis button to open the Text Editor, in which you can enter as much text as needed within the noted limit, which you can see via the character count at the bottom. This information transfers to the Test Plan and Customer Certificate. For more information, see Test Property Sets. Additionally, this text can be translated in the Extended Text 2 field in the Test Translation page by choosing Property > Translations on the Related menu. For more information, see Test Translations.

AQL Values FastTab

The fields on the AQL-Values FastTab are used with Testing Method = *Counting (AQL)* to specify the types of mistakes (Zero Defect, Severe Defect, Critical Defect, Major Defect, Minor Defect). These are the basis for a later calculation of the assumption numbers in the test order.

Miscellaneous FastTab

The fields on the Miscellaneous FastTab contain test property set modification information. These values are automatically determined based on the current date and the active User ID and are non-editable.

Home/Reports Menus

The actions on the Home and Reports menus are described in the following table.

Menu	Action	Description
Home	Copy	Copies the Test Property Set (properties and comments) to a new Test Property Set.
	Update Test Plans	Opens the Update Test Plan Property Set request page, where changed test property sets can be modified in all related test plans in one mass update (see Mass Updates of Test Plans).
	Internal Comments / External Comments	Comments can be used to add notes and remarks about a test property set. - Internal comments are printed on documents that will not leave the company such as test plans. - External comments will be shown on documents that can be sent to the customer or vendor. Whether comments exist is shown in the Contextual Details FastTab.
Reports	Test Property Set List	Generates the Test Property Set List report for preview or printing.

Related Menu

The Related menu contains the Translations action, which opens the Test Translation page, where translations for the Test Property Set can be defined for use on pages that are provided for Value Recording and on selected reports/documents (see Test Property Translations and Test Property and Test Property Sets).

See Also

DIN ISO 2859 - part 1

Feedback

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Test Plans

Test Plans are the templates for a test order to be carried out during or after the item or lot has been received on stock and has gone into quarantine. The Test Plan uses the defined Test Property Sets and Test Devices.

Test Plans can be created item-specific. Either they are related to an item via the Item Card or via the related routing. That means a Test Plan must be allocated to each item that is to be tested.

To create test plans

In the header of the Test Plan template there is general information regarding the Test Plan. In the lines of the template the selected Test Property Sets are listed or are managed.

1. Choose the icon, enter Test Properties, and then choose the related link.
2. Choose the New action.
3. Fill in or update the fields as described in the following tables.

General FastTab

The fields on the General FastTab are described in the following table.

Field	Description
No.	Unique identifier from the number series or manually entered if manual numbering is allowed.
Version	Current version of the test plan. Since Test Plans are versioned, when a Test Plan is certified, it starts with version 1. It is allocated automatically and serially numbered through.
Description	Description of the test plan.
External Document Name	Identifies a document file that relates to the test plan. If a file exists, choose Show External Document on the Home menu to open the file. To upload a file using the standard Import page, choose the ellipsis button or choose Upload External Document on the Home menu. For more information, see Document Storage. *NOTE: This field is displayed only if the Document Storage Point field = Per Record in the Quality Assurance Setup page.*

Field	Description
Status	Current state of the Test Plan. The options are *New*, *Certified*, *Under Development*, and *Closed*. New Test Plans are set with the *New* status. Test Plans that are not certified cannot be used or selected for test orders.
Type	Specifies if the test plan is related to an Item or a Test Device.
Valid from / Valid to	Specifies in which period the test plan can be used. If a test plan has expired and is connected to an item, a message opens upon posting of the receivable.
Default	Indicates if the testing has been defined internally or if it should be executed based on an external request (for example, testing according to the technical supervision society).
De.-/Certification Date / De.-/Certified by	Date and User ID of when certification status changes.
Responsibility Center	Responsibility Center that is allocated to the test plan.
Ready for Certification	Automatically turned on when the status is changed to *Certified*.
Usages Assgnt. (Items)	Displays the number of Test Plan Assignments in which the Test Plan No. is used. Choose the value to open the filtered records in the Test Plan Assignment page. Relevant for Test Plans with Type = *Item*.
Usages (Test Devices)	Displays the number of Test Devices that contain the Test Plan No. as the Default Test Plan No. Choose the value to open the filtered records in the Test Device List page. Relevant for Test Plans with Type = *Test Device*.

Lines FastTab

In the Lines FastTab, the Test Property Sets are allocated to the Test Plan. The pre-selected test values from the Test Property Sets are also copied. It is possible to change certain editable fields of the copied Test Property Sets and criteria. This may be necessary if some of the expected test results have to be changed to fit the related item or routing (such as Upper Limit and/or Lower Limit).

Test Plan Property Set Card

On the Lines FastTab, choose Property Set > Card to open the Test Plan Prop. Set Card for a line. For Test Properties that have a Testing Method of Counting (AQL), specific properties can be tested in a given interval of test quantity. Use the Personalize feature in the Test Plan Prop. Set Card page to show the Test Each (Times) field.

The Test Activity No. field is used to assign a predefined activity to an individual Test Plan Property Set line and specifies how long it takes to perform testing of this property. For more information about Test Order Scheduling, see Test Order Scheduling.

The information entered in the Test Each (Times) field determines whether the lot- or serial number has to be tested or not. For example, if this field is set to *3* on the Scratch test property, scratches will be tested on the first and then again on the fourth test.

> **Note**
> **The Test Each (Times) field cannot be populated if an Inspection Severity Code is entered on the Item Test Prop. Insp. Severities page (see Inspection Severities of Test Properties).**

The Test Locations field indicates whether a test location has been assigned to the test plan property. To assign a test location, choose Property > Test Locations on the Lines FastTab. Enter the location code, any related costs, and select the Standard checkbox if this test location should be copied to the Test Order Property directly.

For information about how determined values are affected by the Upper Limit and Lower Limit fields in the Test Plan Prop. Set Card, see Interpret Determined Value.

In the Contextual Details FastTab you can see whether internal/external comments exist for the test plan property set as well as its short and long text. On the Related menu, choose Property Set > Translations to open the Test Translation page, in which the translations of the test plan property set description, short text, and long text can be viewed or edited (if the test plan is open). For more information, see Test Translations.

To view the source test property information, choose Property > Card to open the Test Plan Prop. Card page.

Test Property Text and Translations

In the Lines FastTab, extended text for the test property is displayed in the Test Property Text and Test Property Text 2 fields. To view or edit (if the test plan is open) the translations of the test plan property description, short text, and long text, choose Property Set > Translations to open the Test Translation page. For more information, see Test Translations.

Usage FastTab

The fields in the Usage FastTab are determined based on the type of Test Plan, either Item or Test Device.

- Type = *Item* – Displays information from the Test Plan Assignment page. If multiple items, item variants or item categories use the test plan, a value of *Unspecific* is displayed in the Item No. field and the other fields are empty, but details of assigned setups are listed in the Test Plan Assignment FactBox. Choose the value in any field to open the Test Plan Assignment page with the filtered records.
- Type = *Test Device* – Displays information from the Test Device page. If multiple test devices use the test plan, a value of *Unspecific* is displayed in the Test Device No. field and the other fields are empty. Choose the value in the Test Device No. field to open the Test Devices page with the filtered records.

Miscellaneous FastTab

The fields on the Miscellaneous FastTab contain test plan modification information. These values are automatically determined based on the current date and the active User ID and are non-editable.

Home/Reports Menus

The actions on the Home and Reports menus are described in the following table.

Menu	Action	Description
Home	Copy Test Plan	Copies all Test Property Sets and criteria of an existing Test Plan to a new Test Plan.
	Create New Version	Creates a new version of an existing Test Plan version (same Test Plan number, new version).
	Show External Document	Opens the external document that was entered in the External Document Name field on the General FastTab. For more information, see Document Storage. *NOTE: This action is displayed only if the Document Storage Point field* = Per Record *in the Quality Assurance Setup page.*
	Internal Comments / External Comments	Comments can be used to add notes and remarks about a test plan. - Internal comments are printed on documents that will not leave the company such as test plans. - External comments will be shown on documents that can be sent to the customer or vendor.

Menu	Action	Description
	Upload External Document	Opens the Import page from where an external document can be uploaded to the Test Plan. For more information, see Document Storage. *NOTE: This action is displayed only if the Document Storage Point field =* Per Record *in the Quality Assurance Setup page.*
	Add Document File	Opens the Related Document Files page where existing documents for the Test Plan can be viewed or new documents can be added. For more information, see Document Storage. *NOTE: This action is displayed only if the Document Storage Point field =* Document File *in the Quality Assurance Setup page.*
	Activities	Opens the Test Plan Activities page, which is used for the Test Order Scheduling process (see Test Order Scheduling). Test Plan Activities define how much time is required for the test process and links the times to resources and manufacturing capacity. Activities added to a Test Plan can be then assigned to one or more Test Plan Property Set lines.
Reports	Test Plan	Generates the Test Plan report for preview or printing.
	Test Plan List	Generates the Test Plan List report for preview or printing.

FactBoxes

The FactBoxes on the Test Plan Card are described in the following table.

FactBox	Description
Test Plan Assignment	Displays the related Test Plan Assignment records in which the Test Plan No. is used. In the FactBox, choose the values to open the filtered records in the Test Plan Assignment page.
Document Files	If the Document Storage Point field = *Document File* in the Quality Assurance Setup page, then the Document Files FactBox will be accessible for attaching new and viewing existing Test Plan documents. For more information, see Document Storage.

Feedback

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Test Plan Assignment on Items and Item Variants

The Item Test Order Option, Sampling Method and Inspection Severity Code can be allocated to the respective item in the Test Plan Assignment page, which is accessed from the Quality Assurance menu on the Item Card.

Test Plan Assignment Page

In this page, assign test plans to different Source Types (such as Purchase Orders, Production Orders, and so on) with Item, Item Variant, Item Category, or Source No. to create individual setups. Test Orders/Test Incidents can be created based on Item Variants with separate Test Plans. Furthermore, this page offers the opportunity to enter customer-specific or vendor-specific test plans.

General FastTab

The fields in the General section are described in the following table.

Field	Description
Source Type Filter	Source type to allocate the test plan to. The options are *Inventory*, *Purchase Order*, *Purchase Receipt*, *Sales Order*, *Sales Return Order*, *Sales Return Receipt*, *Production Order*, *Operation*, *Order-specific*, *Component*, *Certificate*, *Transfer Order*, and *None*.
Source No. Filter	Number of the source type selected in the Source Type Filter field.
Item No. Filter	Item to be affected by these settings.
Variant Code Filter	Item variant to be affected by these settings.
Item Category Filter	Item category to be affected by these settings.
Location Filter	Location to be affected by these settings.

Lines FastTab

The fields in the Lines FastTab are described in the following table.

Field	Description
Source Type	Specifies the source type for the test plan assignment.
Item No.	Specifies the item number for the test plan assignment.
Variant Code	Specifies the variant code for the test plan assignment.
Item Category Code	Specifies the item category code for the test plan assignment.
Location Code	Specifies the location code for the test plan assignment.
Source No.	Specifies the number of the source type selected in the Source Type field.
Contact No.	Specifies the contact person that the Customer Certificate will be sent to, used only with Source Type = *Sales Order*. For more information, see Customer Certificate Card.
Language	Specifies the language of the contact person that the Customer Certificate will be sent to, used only with Source Type = *Sales Order*. For more information, see Customer Certificate Card.
Item Test Order Option	Defines the level on which an item should be tested. The options are: - *No Test*: no test orders are created. - *Test on Item Level*: a single test order is created for the item, regardless of lot- or serial numbers. - *Test on Lot No.*: a test order is created for each lot number. - *Test on Serial No.*: a test order is created for each serial number. For example, if a user posts a Receipt with two lots (Lot A and Lot B) the following tests are created, based on the Item Test Order Option: - *Test on Item Level*: One Test Order: Item No. is populated in the General FastTab; lot information is empty on the Test Plan Source FastTab. - *Test on Lot No.*: Two Test Orders (one for each lot): Item No. and Lot No. are populated.

Field	Description
Sampling Method	Defines for the item if the sampling method according to DIN ISO 2859 should be applied. If the *DIN ISO 2859* option is selected, the Inspection Severity Code and Sampling Method fields must be filled with the ISO2859 or DIN2859 values. In this case, an acceptance sample testing is applied based on faulty parts or errors.
Inspection Severity Code	Required if the *DIN ISO 2859* option is selected in the Sampling Method field.
Test Plan No.	Number of the test plan that should be allocated to the item depending on the source type.
Adjust Lot Status on Test	If selected, the lot status will automatically be set to: - The value in the Lot-/Serial No.-Status on Test Order Release field in the Quality Assurance Setup page when a test order is *Released*. - The value in the Lot-/Serial No.-Status on Test Order Finish field in the Quality Assurance Setup page when a test order is *Finished*.
Automated Test Decision	Determines if the Lot/Serial No. Status can be changed automatically based on inspection result (see Automated Test Decision).
Inspection Level	Indicates the Inspection Level for counting (AQL) to be used for testing; if this field is empty, Inspection Level II is used.
Insp. Severity on Test Prop.	Indicates whether an inspection severity has been assigned to a test property (see Inspection Severities of Test Properties).
No Test Order on Subcontr.	If selected, prevents duplicate testing requirements when creating a Purchase Order for a Production Order line, which may already contain a Test Plan Assignment (Source Type = *Purchase Receipt*) for the subcontracting order.
Test Wait Time	Indicates the time needed to start testing, beginning from the Test Order creation. For example, it may define offset time to start testing after goods receipt posting. The Wait Time Unit of Meas. Code field is required to specify this time. For more information, see Test Order Scheduling.

Field	Description
Wait Time Unit of Meas. Code	Used with the Test Wait Time field to complete the time specification. Codes of Capacity Units of Measure (from manufacturing) can be assigned here. For more information, see Test Order Scheduling.

Copy Item Test Plan Assignment

Existing Test Plan Assignment records can be copied from a selected item to a selection of one or more items using the Create Item Test Plan Assignment function. This function can be accessed from the Test Plan Assignment page by choosing the Copy Test Plan Assignment action or using Tell Me by entering Create Item Test Plan Assignment and then choosing the related link.

The Create Item Test Plan Assignment function provides the ability to copy the Test Plan Assignment for a specific Source Type or for all existing Source Types of the "Template" Item.

The Template Item setup(s) can be copied to one or more items based on specific item filters in one step.

Inspection Severities of Test Properties

Different schedules can be assigned to each test property so that testing is done based on the Inspection Severities of a property as opposed to the Inspection Severity of the overall test plan.

Note

Properties without a specific Inspection Severity will use the one assigned to the Test Plan Assignment line.

In the Test Plan Assignment page, choose the Property Inspection Severities action to open the Item Test Prop. Insp. Severities page.

If the first line has the Test Each Used checkbox selected, this means that a value has been entered in the Test Each (Times) field for the test property, and therefore an Inspection Severity cannot be entered on this line. If a different Inspection Severity Code is entered for a property, the Insp. Severity on Test Prop. checkbox is selected on the Test Plan Assignment page when the Item Test Prop. Insp. Severities page is closed.

Sample Planning

The Sample Planning action opens the Sample Plannings page where you can define the criteria for creating samples for the selected test plan assignment. You can assign a sample occurrence code that may or may not be linked to a sample size template chart or you can create your own sample size chart.

For more information, see Sample Size Charts.

Sample Drawing Instruction

If you have the integration with Advanced Manufacturing Suite (AMS), this action is available on the Related menu. For more information, see Testing Samples.

See Also

DIN ISO 2859 - Part 1

Feedback

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Mass Updates of Test Plans

Changes made to Test Plan Properties and Test Plan Property Sets can be updated at once in all related Test Plans where changed Test Plan Properties/Test Plan Property Sets are assigned.

When this function is run, the current, valid Test Plan may be marked with a Valid to date and a new Test Plan version may be created with a Valid from date. The new Test Plan version is a copy of the original Test Plan version. It will include all information for all other Property Sets/Properties and the updated information for the current Property Set or Property.

Update Test Plans

In the Test Property Card and Test Property Set pages, choose the Update Test Plans action to open a request page with several options.

The fields in the Validity FastTab are described in the following table.

Field	Description
Active Version "Valid To"	Indicates the date to which the current Test Plan Version will be valid. Typically, this will be the day before the New Version "Valid From" date.
New Version "Valid From"	Indicates the date from which the new Test Plan Version will be valid. Typically, this will be the day after the Active Version "Valid To" date.
Use Record Selection	Determines if a page opens that lists all test plan properties and test plan property sets that can be selected for updating.
Copy From Certified Test Plans	Determines if the latest, valid certified Test Plans will be included in the update process. Otherwise, the latest version will be selected and status together with valid date period is not relevant. This setting defaults from the Quality Assurance Setup page but can be changed in the request page.

Updating Test Plans from Test Properties

Although most settings in Test Properties are typically defined in the Test Property Sets, there are instances where a standard criteria is valid for all tests. If one of these criterion is changed, the Update Test Plan function will handle this change in all related Test Plan

Property Sets in the Test Plans.

> **Note**
> **The actual Test Plan Property Sets are not changed with this function.**

Updating Test Plans from Test Property Sets

In most situations, Test Plans should be updated from the Test Property Set because of the specifically defined properties.

Feedback

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Test Property Translations

The translation feature in Test Properties makes it possible to add multilingual capabilities to the testing process. This is helpful for multilingual testing facilities or generating reports that are required in a customer's language.

Translations can be added to the Test Properties and/or Test Property Sets based on the business process. The translations transfer from these settings to the Test Plans through to Value Recording. These translations can be modified in the various pages as needed, and viewed in the Test Plan, Test Order, Analysis Certificate, and Customer Certificate reports.

To add translations in test property sets

Although translations can be added to Test Properties, they are ideally added to Test Property Sets, which are directly used in Test Plans. In addition to the translations of the Test Properties, a single translation can be added to the Test Property Set.

1. On the Related menu of the Test Property Set Card, choose Property Set > Translations to open the Test Translation page.
    1. In the Language Code field, enter the relevant language and then the translation of the description in the Description field.
       This translation will be used as the Description of the Test Property Set in value recording and reports.
    2. In the Extended Text field, enter the translation for the text in the Test Property Short Text field on the Contextual Details FastTab.
    3. In the Extended Text 2 field, enter the translation for the text in the Test Property Long Text field on the Contextual Details FastTab.
    4. Close the Test Translation page.
2. On the Lines FastTab, choose Line > Translations to open the Test Translation page for the individual Test Properties.
    1. In the Language Code field, enter the relevant language and then the translation of the Description field from the line in the Description field.
       This translation will be used as the Description of the Test Property in value recording and reports.
    2. In the Extended Text field, enter the translation for the text in the Test Property Text field on the line.
    3. In the Extended Text 2 field, enter the translation for the text in the Test Property Text 2 field on the line.

Note
Translations added to existing Test Properties/Test Property Sets are not automatically updated through to the Test Plan. Therefore, the Update Test Plan function must be run from the Test Property Sets to update all related Test Plans at once (see Mass Updates of Test Plans). Translations added to new or existing Test Properties/Test Property Sets will be included in new Test Property Sets and Test Plans.

Translations in Test Plans

Once the translations are added to the Test Properties and the Update Test Plan function is run (if added to an existing Test Property Set), the translations of Test Properties and the Test Property Set are available in the Test Plan.

The Test Property translations are visible by opening the Test Plan Prop. Set Card (Lines FastTab > Property Set > Card), choosing the test property, and then choosing Property > Translations on the Lines FastTab.

If changes are made to the Description or Test Prop. Set Text field in the Test Plan line, the translations can be updated in the Description and Extended Text fields, respectively, by choosing Property Set > Translations on the Lines FastTab.

Translations in Test Orders

Translated test properties and test property sets are visible in the Test Order if a QA Language Code is defined in the User Setup.

If a language code used in the translations is not defined per user or a language code does not exist for the Test Property Set, then the default language in COSMO Quality Assurance is shown in the description field of the Test Order line.

The settings in the User Setup are also enabled for viewing the Test Order Properties with translations. In the Test Plan Prop. Set Card, the Caption field in the General FastTab shows the translated Test Property Set description and the Description field in the Lines FastTab show the translated Test Properties.

Translations in Value Recording Pages

The settings in the User Setup also apply to the various Value Recording pages. In the QA Value Recording page (opened from the Test Order), the translated Test Property is visible in the Description field.

In the Test Order/Value Recording Card and the Value Recording Worksheet pages, the translated Test Properties are listed in the Description field of the Lines FastTab.

Translations in Customer Certificate

Translated test methods, test property sets, and test properties are visible in the Customer Certificate Card on the Translations menu in the Lines FastTab.

Translations in Reports

Translations of Test Properties and Test Property Sets can be included in reports by entering the relevant Language Code in the report request page. The reports with translation capabilities are the Test Plan, Test Order, Analysis Certificate, and Customer Certificate/Customer Certificate Test reports.

Similar to the visibility of translations in the Test Order and Value Recording pages, translations will be displayed for test properties/test property sets that match the Language Code; otherwise, the report text will print in the default system language.

Translations in Test Plan Report

In the Test Plan report request page, enter the valid language to include in the report.

Translations in Test Order Report

In the Test Order report request page, enter the valid language to include in the report.

Translations in Analysis Certificate Report

In the Analysis Certificate report request page, enter the valid language to include in the report.

Translations in Customer Certificate Reports

For the Customer Certificate and Customer Certificate Test reports, enter the valid language in the Language Code field in the General FastTab of the Customer Certificate Card.

Translation of Test Property Values in Reports

It is also possible to add translations to the Test Property Values (for example, color selections) to be shown in reports. In the Test Property Card, choose the Test Property Values action on the Home menu. In the Test Property Values page, choose Related > Translations and then enter the translations as described for the Test Property Set.

Feedback

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Document Storage

The storage of document files in Test Plans, Test Orders, Test Incidents, and Sample Occurrences can be handled in the Document Files table or per record, as determined in the Document Storage Point field in the Quality Assurance Setup page. The fields and actions on the pages are determined by this setting as well.

When copying records, it is possible to copy attached documents from:

- Sample Occurrences to Test Incidents
- Test Plans to Test Orders

> **Note**
> **To add or change a document, the status of the Sample Occurrence and Test Plan cannot be *Certified* or *Closed*. For the Test Order and Test Order/Value Recording Card, the status cannot be *Testing Finished*, *Finished*, or *Cancelled*.**

Document Storage Point = Document File

If using the *Document File* option, all document files used on the noted COSMO Quality Assurance pages must be stored in the Document File table. Files can be added directly in the Document File table and then accessed from the records or uploaded from the records to the Document File table.

> **Tip**
> **Records in the Document Files table use the number series set in the Document File Nos. field in the Numbering FastTab of the Quality Assurance Setup page.**

To import a document to the Document File

1. Choose the icon, enter Document Files, and then choose the related link.
2. Choose the New action to create the record.
3. Choose the Import Document action to open the standard Import page for file selection.
4. Locate the file for upload and then choose the Open button.

> **Note**
> **The file to be uploaded is compared to the ones already stored in the table to**

> **avoid duplicates. If a file seems to be equal to an existing file, a message opens stating that the user must confirm or cancel the upload.**

5. Choose the Show Content action to view the documents.

To assign an existing document file to a record

1. Choose the Add Document File action on the Home menu (or action bar).
2. In the Related Document Files page, choose the drop-down arrow in the Document File No. field to open the available documents, and then select the document to attach to the record.

To add a new document to the Document File

1. Choose the New action (or go to an empty line).
2. In the empty line, choose the drop-down arrow in the Document File No. field and then choose New at the bottom of the list page.
3. In the Document Files page, choose the New action and then choose the Import Document action.
4. Locate the file for upload and then choose the Open button.
5. Choose the new document file and then choose the OK button. The new file is added to the Related Document Files page for the record.

Document Files FactBox

The Document Files FactBox is available on each record to indicate if documents have been attached. New documents can be added and existing documents can be viewed from this FactBox.

Document Storage Point = Per Record

If using the *Per Record* option, the documents are stored in the individual record files. The External Document Name field on the General FastTab of each card serves two purposes:

- uploads the files to the record
- indicates the name of the uploaded file

To upload a file using the standard Import page, choose the ellipsis button in the External Document Name field. Alternatively, documents can be uploaded by choosing the Upload External Document action on the Home menu (or action bar) as well.

The documents can be viewed by choosing the Show External Document action on the

Home menu or action bar.

Documents can be deleted from the records by clearing the External Document Name field.

Feedback

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Test Execution

Once all the elements for testing have been set up, test orders can be created. After creation, there are numerous ways to execute the tests. In all cases, test values are recorded in the test order using the **Value Recording** function.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Learn how test orders are created based on test plan assignment.	Test Order Creation
Learn about the fields and actions on the Test Order Card.	Test Orders
Enter testing results in the Test Order/Value Recording Card.	Test Order/Value Recording Card
Learn about and how to enter results in the Value Recording Worksheet.	Operator-Centric Recording of Quality Measurements
Enter multiple measured values for a test property.	Multiple Measurements
Enter an unspecified inspection result on a test order.	Unspecified Inspection Result on Test Orders
Automate the change of Lot-/Serial No. Status based on an inspection result.	Automated Test Decision
Find out which customer's specifications match a failed testing result.	Test Order Comparison
View test results for test orders filtered by date, item, item and variant, lot or serial number.	Testing History

Feedback

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Test Order Creation

Based on the Test Plan Assignment, it is possible to either create a test order manually from several document types (unless otherwise noted, choose Functions > Create Test Order on the Lines FastTab) or create the test order automatically.

Test Plan Assignment / Source Type	Document Type	Create Test Order
Purchase Order	Purchase Order	Test Order/Test Incident will be created automatically when a Purchase Order is released. Additional Test Orders/Test Incidents can be created manually by using the Create Test Order function on the Purchase Order line.
Purchase Receipt	Warehouse Receipt	Test Order/Test Incident will be created automatically when a receipt line is posted. Additional Test Orders/Test Incidents can be created manually by using the Create Test Order function on the Warehouse Receipt line.
Sales Order	Sales Order	Manual (Lines FastTab > Line > Quality Assurance > Create Test Order)
Sales Order	Warehouse Shipment	Manual
Sales Return Order	Sales Return Order	Manual
Sales Return Receipt	Posted Return Receipt	Manual
Production Order	Released Prod. Order	Depending on the setting in the Prod. Test Order Creation field on the Quality Assurance Setup page, a Test Order is created: - automatically by changing Production Order Status to Released - manually by user (Lines FastTab > Functions > Create Test Order) - automatically on output posting

Test Plan Assignment / Source Type	Document Type	Create Test Order
Operation	Prod. Order Routing	Depending on the setting of the Prod. Test Order Creation field in the Quality Assurance Setup page, a Test Order is created: - automatically by changing the Production Order Status to Released - manually by user (Quality Assurance > Create Test Order)
Inventory	Lot-/Serial No. Administration	Manual (New > Create Test Order) *NOTE: An inventory check can only be done in connection with lot numbers, not for serial numbers.*
Component	Prod. Order Component	Manual (Home > Quality Assurance > Create Test Orders)
Order-specific	Sales Order	Manual (Lines FastTab > Line > Create Test Order)
Transfer Order	Transfer Order	Manual (Lines FastTab > Line > Quality Assurance > Create Test Order)

Feedback

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Test Orders

In the test orders, the determined actual values of a test are entered and, if available, compared with the predetermined required value. The goal of the test order is to determine if a test was successful within its required value specifications.

Test orders can be opened by status (Test Orders - Created, Test Orders - Value Recording, Test Orders - Testing Finished, Test Orders - Finished, and Test Orders - Cancelled) or from the Test Order List page where all test orders are listed. Choose the icon, enter the page name, and then choose the related link.

Test Order Card

The structural composition of the Test Order is essentially the same as that of the Test Plan.

The compilation of test orders can occur in different ways. Test orders can be created according to specification from an arrival or by arrival of material from a production order. These test orders can be created manually or automatically (based on Test Plan Assignment, see the table in Test Order Creation) and can be processed immediately. In the following sections, the fields are explained based on an automatically generated test order.

When creating a test order manually, the entry fields must be filled accordingly.

General FastTab

The fields on this FastTab are described in the following table.

Field	Description
No.	Unique identifier from the number series or manually entered if manual numbering is allowed.
Description	Description of the test order.
Test Destination Type	Predetermined if the test order to be carried out is related to test device or to an item test.
Test Destination No.	Number that builds the basis for the test order, based on the value in the Test Destination Type field.
Test Destination Variant Code	Variant that applies to the item, based on the value in the Test Destination No. field.

Field	Description
Test Date	Date the test order is created. This date can be changed manually if the test is to be carried out at a later date.
External Document Name	Identifies a document file that relates to the test order. If a file exists, choose the ellipsis button or choose the Show External Document action on the Home menu to open the file. To upload a file using the standard Import page, choose the Upload External Document action on the Home menu or choose the ellipsis button in this field. For more information, see Document Storage. *NOTE: This field is displayed only if the Document Storage Point field =* Per Record *in the Quality Assurance Setup page.*
Vendor No.	Vendor number which builds the basis for the test order, if it is a Test Plan that has been generated upon arrival.
Quantity to Test	The value in this field (= delivery quantity; is transferred from the recorded quantity in the arrivals) serves as a calculation basis for the calculation of the value in the Random Sample Quantity field.
Test Plan No. / Test Plan Version Code	Automatically filled according to specification of the chosen Test Plan.

Field	Description
Status	Current processing state of the Test Order. The options are: - *Created*: Set if no processing has occurred. - *Value Recording*: Set manually by choosing the Release action on the Home menu. Now it is possible to begin the test by entering the determined actual values. Erroneously entered determined values can be changed or tests can be cancelled while in this status. - *Testing Finished*: Set when all property sets have been processed. - *Finished*: Set manually, by choosing the Finish action on the Home menu, when all property sets have been processed. No changes can be made with this status. - *Cancelled*: Set manually, by choosing the Cancel action on the Home menu, when a test order needs to be cancelled. This may be necessary, for example, if one determined value lies beyond the expected values and as a result all further values are irrelevant. It is also possible to change the status of multiple test orders using the Change Test Order Status function, accessible using Tell Me. Choose the icon, enter Change Test Order Status, and then choose the related link.

Field	Description
Stability Test Status	Current processing state of the Stability Test. The options are: - *In Process*: Set automatically and used internally to prevent parallel processing. - *On Hold*: Set when the order is created or after processing when further stability tests exist. - *Cancelled*: Set manually, by choosing the Cancel action on the Home menu, when a test order needs to be cancelled. This may be necessary, for example, if one determined value lies beyond the expected values and as a result all further values are irrelevant. This function can cancel only the Test Order or the Test Order and the Stability Test (see Cancel a Stability Test). - *Finished*: Set manually, by choosing the Finish action on the Home menu, when all property sets have been processed. No changes can be made with this status. It is also possible to change the status of multiple test orders using the Change Test Order Status function, accessible using Tell Me. Choose the icon, enter Change Test Order Status, and then choose the related link.
No. Printed	Automatically populated/updated each time the test order is printed.
Invalid Determined Value	Indicates if there are any differences after entering the actual values to the required value specification of the property set.
Blocked Test Devices	Indicates if a test device used in the test order is blocked due to a lack of inspection or manual blocking.
Random Sample Quantity	Quantity of the random sample that is to be tested when running an attribute testing (faulty/not faulty parts). The basis for this calculation is the Quantity To Test field.
Inspection Result	Indicates the test result, calculated based on the test property values.
Responsibility Center	Identifies the Responsibility Center that is allocated to the test order.
Sample Exists	If you have the integration with Advanced Manufacturing Suite (AMS), this field is available. For more information, see Testing Samples.

Lines FastTab

In the Lines FastTab, the Test Property Sets are allocated to the Test Order from the Test Plan.

Test Property Set Menu

On the Lines FastTab, choose the Test Property Set menu to access actions that relate to the selected Test Property Set line.

Test Plan Source FastTab

The Test Plan Source FastTab contains fields that display information about the source document that created the test plan.

The fields on this FastTab are described in the following table.

Field	Description
Source Type	Origin of the test order, if generated from a purchase delivery, a sales document, a production order, a process step, a stability test, or a production order component.
Source Status	Status of the production order if the Source Type field is set to *Production Order*.
Source No.	Number of the source document.
Source Line No.	Line number of the source document to which the test order refers.
Source Routing No. / Source Operation No. / Source Component Line No.	Routing, operation, or component line numbers from which the test order originated if the Source Type field is filtered on *Production Order*, *Operation*, or *Component*.
Order-specific	Indicates if the Test Order was created from a Sales Order with an Order-specific test plan.
Creation Date / Created by / Last Date Modified / Last Modified by	Test order creation and modification information. These values are automatically determined based on the current date and the active User ID and are non-editable.
Lot No. / Serial No.	Item tracking information to which the test order refers; populated based on the selection in the Item Test Order Option field on the Test Plan Assignment page for the item (see Test Plan Assignment on Items and Item Variants).
Package No.	This field currently has no functionality.
Test Incident No. / Test Incident Order No.	Used with Test Incidents (see Test Incidents).

Miscellaneous FastTab

The Miscellaneous FastTab contains information about evaluation levels and repeat orders.

In the Test Type and Test No. fields, the evaluation level that builds the basis for the test order is indicated by number. The values for these fields are transferred from the Test Status page, if they exist, on release of the Test Order. After completion of the test order, this page is filled by the appropriate newly determined value from the Inspection Severity page.

The Repeat No. and First Order No. fields indicate respective information as to the original test order if the current test order is a repeat test order.

Planning FastTab

Test Orders can be scheduled and therefore, receive Starting Date-Time and Ending Date-Time. The fields on the Planning FastTab are used with the Test Order Scheduling function. If no activities are assigned to Test Order Properties, then no Ending Date-Time is calculated.

The Starting Date/Time and Ending Date/Time are calculated based on the Source Type and the duration in the Test Order Activities. For more information, see Test Order Scheduling.

Home Menu

The actions on the Home menu are described in the following table.

Action	Description
Test Order Property Sets	Opens the Test Order Property Set page, which lists all property sets that are allocated to this test order.
Upload External Document	Opens the Import page from where an external document can be uploaded to the Test Order. For more information, see Document Storage. *NOTE: This action is displayed only if the Document Storage Point field =* Per Record *in the Quality Assurance Setup page.*
Show External Document	Opens the external document that was entered in the External Document Path field on the General FastTab. For more information, see Document Storage. *NOTE: This action is displayed only if the Document Storage Point field =* Per Record *in the Quality Assurance Setup page.*

Action	Description
Value Recording	Opens the QA Value Recording page, which contains various pieces of information that refer to the respective property set. All property sets to be examined are displayed consecutively and the ascertained actual-value is entered (see Record values in the test order).
Calc. Sample Size	Calculates the random sample quantity and assigns it in the Random Sample Quantity field if the test order Status field is set to *Created*. The basis for this calculation is the value in the Quantity to Test field. Based on this value, a key letter is determined in the Sample Size/Inspection Level page. The required sample size is allocated to this key letter in the Sample Instruction Setup page. The sample size will be transferred to the Random Sample Quantity field.
Release	Populates the Test Type and Test No. fields on the Miscellaneous FastTab, determines the current values from the Inspection Severity Plan, and populates the maximum accepted error quantity fields. It then changes the Status field to *Value Recording*.
Cancel	Used when a test order needs to be cancelled. This may be necessary, for example, if one determined value lies beyond the expected values and as a result all further values are irrelevant. Changes the Status field to *Cancelled*.
Finish	Used when all test order processing has been completed. Changes the Status field to *Finished*; no changes can be made with this status.
Reset Value Recording	Resets the Status field from *Value Recording* back to *Created*.
Reset Test Order	Resets the Status field from *Finished* back to *Testing Finished*.
Add Document File	Opens the Related Document Files page where existing documents for the Test Order can be viewed or new documents can be added. For more information, see Document Storage. *NOTE: This action is displayed only if the Document Storage Point field =* Document File *in the Quality Assurance Setup page.*

Action	Description
Activities	Opens the Test Order Activities page, which displays all activities related to this Test Order. An activity listed on this page may refer to more than one Test Order Property. It defines the starting and ending of individual testing activities and includes a link to assigned Resource and Work Center. All listed activities are parallel operations and therefore, the longest Execution Time defines the Ending Date-Time of the entire Test Order. For more information, see Test Order Scheduling.

Reports Menu

The actions on the Reports menu are described in the following table.

Action	Description
Test Order	Generates the Test Order report for preview or printing; this is typically an internal document.
Analysis Certificate	Generates the Analysis Certificate report for preview or printing, which displays the test results of a test order. It is an external document that is provided to the customer.
Sample Spare Label	Generates a Spare Label for a sample (see Sample Planning).

Actions Menu

The actions on the Actions menu are described in the following table.

Action	Description
Copy Test Plan	Copies a Test Plan which differs from the requirements in the master data for the examination of an item or test device, respectively. In doing so, the evaluation levels and property sets registered with the new Test Plan of the copied Test Plan are overwritten. The copying of a Test Plan is only possible when the Status field is set to *Created*.
Copy Test Order	Copies evaluation levels and their allocated property sets from an existing test order into the current test order. This function is equipped with a safety scan in the occasion that existing evaluation levels and property set lines are entered with the current test order. The copying of one test order into another is only possible if the Status field of the destination order is set to *Created*.

Action	Description
Create Repeat Order	The pre-condition for creating a repeat order is that the Status field of the test order is set to *Finished*. When this function is run, a message opens that states the test number of the repeat order. The repeat order is created with the Status field set to *Created* and can be processed. In the Miscellaneous FastTab, the number of the original (source) test order is displayed in the First Order No. field.
Test Decision	On a Finished test order, opens the Lot-/Serial No. Administration page, which is used to release or block a lot (for more information, see Lot-/Serial No. Administration). *NOTE: If a test order that has not been finished but exists for a lot, this lot cannot be released. It is merely possible to block the lot or conditionally release it for production.*
Create Return Order	Used to create a Purchase Return Order. This function is only available if the Test Order is related to a Purchase Receipt and the Inspection Result = *Items are not OK*.
Compare Test Result	Used if the item has vendor-related Test Plans, the Test Order Status = *Testing Finished* or *Finished*, and the Inspection Result = *Items are not OK*. The results are compared to the Sales Order Test Plans that are related to a single customer number.
Reset Inspection Result	Used to reset the value to *Unspecified* in the Inspection Result field (see Unspecified Inspection Result on Test Order). This function can only be run by an authorized user.
Draw Sample	If you have the integration with Advanced Manufacturing Suite (AMS), this action is available. For more information, see Testing Samples.

Related Menu

The actions on the Related menu are described in the following table.

Action	Description
Test Order Properties	Opens the Test Order Properties page, which lists the values from the properties that were entered for the Test Property Set in the Lines FastTab.
Internal Comments / External Comments	Comments can be used to add notes and remarks about a test order. - Internal comments are printed on documents that will not leave the company. - External comments will be printed on documents that can be sent to the customer or vendor.

Action	Description
Return Orders	Opens the Return Orders that are created from the Test Order. This can be used if the Return Order is related to a Purchase Receipt.
Source Document	Opens the document from which the Test Order was created.

Document Files FactBox

If the Document Storage Point field = *Document File* in the Quality Assurance Setup page, then the Document Files FactBox will be accessible for attaching new and viewing existing Test Order documents. For more information, see Document Storage.

To process a test order

Release a test order for value recording

1. Choose the icon, enter Test Orders - Created, and then choose the related link.
2. Open the test order to be processed.
3. On the Home menu, choose the Release action.

The Test Order Card page closes (or a different order is active if one exists); the released order was removed from this view because of the status change.

Record values in the test order

1. Choose the icon, enter Test Orders - Value Recording, and then choose the related link.
2. Open the test order to be processed.
3. On the Home menu, choose the Value Recording action.
   The QA Value Recording page opens with the first Test Property Code from the test order.
4. Enter the testing information based on the type of testing method:
   - Testing Method = *Counting (AQL):*
     - If there are no errors, choose New > Det. Value within Exp.
     - If there are errors, enter the number of units with errors in the corresponding Failed Qty. X fields and then choose New > Tested.
   - Testing Method = *Measuring*:
     - Enter the result in the Determined Value field, and then choose the Next Property action to move to the next property.
     - Fill in the Error Code field if there was a measurement testing failure.

5. Repeat step 4 for all remaining properties.
6. A message opens stating the testing is finished. Choose the OK button to close the message.

The QA Value Recording page closes automatically when all properties are tested and the Test Order is closed because the Status field has changed to *Testing Finished*.

Finish the test order

1. Choose the icon, enter Test Orders - Testing Finished, and then choose the related link.
2. Open the test order to be finished.
3. On the General FastTab, note that the Inspection Result field is set to *Items are OK* or *Items are not OK*, depending on the testing.
4. On the Lines FastTab, note that the Tested field is set to *Yes* or *No* on each line, depending on the testing.
5. On the Home menu, choose the Finish action.
6. Choose the Yes button to close the test order.

The Test Order Card closes because the Status field has changed to *Finished*.

Feedback

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Test Order/Value Recording Card

The Test Order/Value Recording Card page can be used to enter values directly on the Test Order lines instead of entering values in the QA Value Recording page.

The Lines FastTab on the Test Order/Value Recording Card page contains the same fields that are on the QA Value Recording page. The Test Property menu on the Lines FastTab contains actions that relate to the selected Test Order/Value Recording line.

To enter testing results in the Test Order/Value Recording Card

1. Choose the icon, enter Test Order List/Value Recording, and then choose the related link. The Test Order List/Value Recording page displays all orders regardless of status.
2. Open the test order to perform the value recording.
3. On the Home menu, choose the Release action.
4. In the Lines FastTab, enter the testing results:
   - For Testing Method = *Counting (AQL)*:
     - Select the Property Tested checkbox if there are no units with errors.
     - Enter the number of units with errors in the corresponding Failed Qty. X fields and then select the Property Tested checkbox.
   - For Testing Method = *Measuring*:
     - Enter the result in the Determined Value field.
     - Fill in the Error Code field if there was a measurement testing failure.
5. When the last value is entered, a message opens stating that testing has finished; choose the OK button.
   The Inspection Result field is updated and the Status is updated to *Testing Finished*.
6. On the Home menu, choose the Finish action to complete the testing process.

Feedback

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Operator-Centric Recording of Quality Measurements

The Value Recording Worksheet page shows the Test Order Properties in a table where filters can be set on Test Device / Test Location and the value recording can be done directly.

> **Note**
>
> **Test Orders must be set to Status = *Value Recording* to be displayed in the Value Recording Worksheet.**

Value Recording Worksheet

The Value Recording Worksheet page is accessed using Tell Me. Choose the icon, enter Value Recording Worksheet, and then choose the related link.

The worksheet opens with a filter on the properties that are not tested and (if exists) a Responsibility Center from the User Setup. This view can be filtered by Test Device, Item No., Test Location, Test Incident, Source Type, and Source No. The Test Order Filter field can be added via the Personalize feature to extend the filtering capabilities. Close and reopen page to enter a specific test order or range of test orders.

Other filtering includes the Show Tested toggle, which shows all lines with Property Tested = *TRUE*, and the Show Acceptance Limits toggle, which shows the Expected Value, Expected Boolean Value, Upper Limit, and Lower Limit fields on the lines.

On the action bar, related information from the Test Order can be opened, including the Test Order itself, the Source Document from which the Test Order was created, the Test Order Property Card, the Test Devices list page, the Test Locations list page, and the comments pages.

The FactBoxes on the worksheet are described in the following table.

FactBox	Description
Test Property	Shows the Test Property Set Description, Test Property Code, and Test Location Code related to the selected line.
Test Comments	Shows the Internal Comments related to the selected line.

FactBox	Description
Test Order Information	Shows Test Method, Test Order Source Type, Vendor Name, Quantity to Test, and whether Multiple Measurements exist for the test order of the selected line.
Test Devices	Shows up to five Test Devices related to the selected line.

Value Recording

The value recording is done the same as in the Test Order/Value Recording Card by completing the appropriate fields for Counting Testing ("Failed Qty. ...") or Measuring Testing ("Determined Value"). The Property Tested checkbox may need to be set manually for counting testing.

If colors for valid and invalid results are defined in the Quality Assurance Setup, then the Description, Unit of Measure Code, and Determined Value fields are updated with these colors if the Show Tested toggle is turned on and the Property Tested checkbox is selected.

When all properties of a Test Order are tested, the test order Status is set to *Testing Finished*.

Once the status is changed to *Testing Finished*, the lines are removed from the Value Recording Worksheet, regardless of the setting in the Show Tested toggle.

As with the Test Order/Value Recording Card, all value recording is updated in the Test Order Card.

See Also

Test Locations
User Setup
Test Incidents
Test Order/Value Recording Card
Test Orders

Feedback

Submit feedback for this page .

Multiple Measurements

With the multiple measurements functionality, you are able to record multiple measured values during the value recording process. The inspection result for the measurement is determined based on whether the values are within the tolerances or not.

Result Types that have type *Boolean*, *Decimal*, and *Option* can be recorded with multiple measurements:

- For *Decimal* values, the total value of the measurement is calculated using the average of all entered values.
- For *Boolean* and *Option* values, each entered result (measurement) will be verified against the Expected Value then for:
  - *Boolean* - The Determined Value of the Test Order Test Property will reflect the value of the majority (50%+1) of the recorded measurements. For example, four lines with "Y" and five lines with "N" will result in Determined Value = "N".
  - *Option* - The results differ based on whether there are more than two options:
    - Two options: Follows the same logic as *Boolean* in which the Determined Value of the Test Order Test Property will reflect the value of the majority (50%+1) of the recorded measurements. For example, four lines with "OK" and five lines with "OOS" will result in Determined Value = "OOS".
    - More than two options: If the majority of the recorded measurements meet the Expected Value of the Test Order Test Property, this value will be assigned as the Determined Value. Otherwise, the Determined Value will remain empty.
      For example, the Expected Value is "RED".
      - If the recorded measurements are: three "RED", one "GREEN", and one "BLUE", then the Determined Value = "RED".
      - If the recorded measurements are: two "RED", three "GREEN", and one "BLUE", then the Determined Value is empty.

Setup

To use the multiple measurements functionality, you must turn on the Multiple Recording toggle in the General FastTab of the relevant Test Property Card (choose *Show more* to make the field visible). After turning this toggle on in an existing Test Property Card, run the Update Test Plans action to update this setting in the related Test Plans (see Mass Updates of Test Plans).

Value Recording

In the standard process for recording measurements, you enter the measured value in the Determined Value field in one of the value recording pages (QA Value Recording, Test Order/Value Recording Card, and Value Recording Worksheet) and then continue to the next measurement.

The process for test properties that have the Multiple Recording toggle turned on is that the measured values are entered in the Test Order Measurements page, which can be opened by:

- entering a value in the Determined Value field – the page opens with this value as the first entry
- choosing the *No* value in the Multiple Measurement Exists field – the page opens with minimal information where you can begin the process by entering the first measured value

The fields on the Test Order Measurements page are described in the following table.

Field	Description
Entry No.	Indicates the entry number of the measured value.
Test Property Code	Indicates the test property code of the measured value.
Measured Value	Indicates the measured value.
Lower Limit	Indicates the lower limit of the acceptable tolerance.
Upper Limit	Indicates the upper limit of the acceptable tolerance.
Expected Value	Indicates the value expected for this test property.
Valid Determined Value	Indicates whether the measured value is within the acceptable tolerance.
Created By / Created At / Modified By / Modified At	Specifies the user ID and date/time the entry was created and modified.

When the Test Order Measurements page is closed, the recorded values are calculated and entered in the Determined Value field as described above. If the value is within the tolerance, the Valid Determined Value toggle is turned on; otherwise, the toggle remains turned off.

The Property Tested field is not set automatically for lines with multiple measurements because the number of needed values is unknown. Therefore, you must manually set the property as tested.

To enter multiple measurements

1. Create a test order with test properties that allow multiple measurements.
2. Begin the value recording process from the Test Order Card, Test Order/Value Recording Card, or Value Recording Worksheet.
3. For the line with the test property for multiple measurements, enter the first value in the Determined Value field or choose the *No* value in the Multiple Measurement Exists field.
   The Test Order Measurements page opens either with the first entry populated or with no values, respectively.
4. In the Measured Value field, enter the measured value.
5. Go to the next line and enter the next measured value.
6. Repeat step 5 for all measured values.
7. Choose the Close button when all values are entered. The results are:
   - The Multiple Measurement Exists field is set to *Yes*.
   - The Determined Value and Output Value fields are populated with the measured values as described above.
   - The Valid Determined Value toggle is turned on if the value is within the tolerance or is turned off if not.
8. Set the test property as tested:
   - In the QA Value Recording page, choose the Tested action on the New menu.
   - In the Test Order/Value Recording Card or Value Recording Worksheet page, select the Property Tested checkbox on the line.
9. Continue with processing the other lines with or without multiple measurements to finish the test order.

To view multiple measurements in test order

Multiple measurements entered in a Test Order line can be viewed in the *Testing Finished* or *Finished* Test Order by choosing Test Property Set > Card from the Lines FastTab. In the Test Order Prop. Set Card (M) page, choose the *Yes* value in the Multiple Measurement Exists field. The fields on the Test Order Measurements page are described above.

Feedback

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Unspecified Inspection Result on Test Order

When entries are not relevant for an Inspection Result, it is possible to skip a Test Property in the measuring testing by selecting the Property Tested checkbox. This prevents the Test Order from being closed but sets the Inspection Result to *Items are not OK*, which is not necessarily correct.

This functionality provides the ability to skip these test properties without automatically setting an Inspection Result, thus allowing the correct result to be selected after testing.

> **Note**
> **This functionality is available on the Test Order Card and Test Order/Value Recording Card. Value recording done in the Test Order Worksheet is transferred accordingly to the Test Order where the Inspection Result can be updated.**

To skip test properties during value recording, turn on the Use Unspecified Status on Test Order toggle in the Quality Assurance Setup page, which will set the Valid Determined Value field to *TRUE* and the Inspection Result field to *Unspecified* when no Determined Value is entered.

When the Use Unspecified Status on Test Order toggle is turned on, the value in the Inspection Result field in the Test Order is determined as follows:

- Items are not OK – when one of the Test Order Properties tests failed (Valid Determined Value = *No*).
- Items are OK – when all Test Order Properties tests passed (Valid Determined Value = *Yes*).
- Unspecified – when no Determined Value was entered in at least one Test Order Property from a Test Order Property Set with Measuring Testing.

The Inspection Result field on the Test Order is editable when the value is set to *Unspecified*.

When the test order Status = *Testing Finished* and the Inspection Result = *Unspecified*, the Test Order cannot be finished unless the Inspection Result is changed to *Items are OK* or *Items are not OK*. However, the value in the Inspection Result field can only be changed by users that have been authorized to Update Inspection Result in the User Setup page.

Important
If changes need to be made to tested lines with a blank Determined Value field (for example, because it was missed during the testing process), the Property Tested checkbox must be cleared on the line before entering a value in the Determined Value field otherwise it will be ignored for the Inspection Result.

Reset Inspection Result

If for any reason the Inspection Result needs to be reset to *Unspecified*, only an authorized user can run the Reset Inspection Result function on the Actions menu of the Test Order.

See Also

Test Orders
Test Order/Value Recording Card

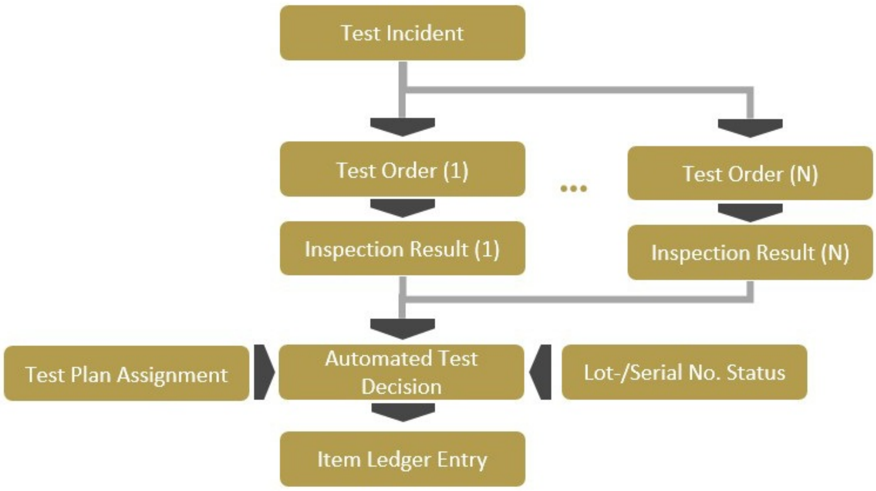
Feedback

Submit feedback for this page .

Automated Test Decision

Automated test decisions allow you to automate the change of Lot-/Serial No. Status based on an inspection result. When a Test Incident status changes from *Ongoing* to *Archived*, the inspection results of the test orders are checked. Based on the inspection results, the Lot-/Serial No. Status is automatically adjusted for the complete quantity.

The follow graphic shows the process flow of the Automated Test Decision function.



Setup

The following sections describe the setup needed to use the Automated Test Decision function.

Quality Assurance Setup

In the Quality Assurance Setup page, turning on the Automated Test Decision toggle will allow the automated change of Lot-/Serial No. Status based on inspection result. To prevent the confirmation message from appearing during automated status changes, turn on the Skip Message on Automated Test Decision toggle.

If you need to include Lot-/Serial No. Status changes based on *Unspecified* inspection results, ensure that the Use Unspecified Status on Test Order toggle is turned on. For more information, see Unspecified Inspection Result on Test Order.

Lot-/Serial No. Status

In the Lot-/Serial No. Status page, an inspection result can be assigned to a status which corresponds to the inspection result in the Test Orders. The options in the Inspection Result field with the corresponding test order values are:

- Accepted = Items are OK

- Denied = Items are not OK
- Unspecified = Unspecified

Test Plan Assignment

In the Test Plan Assignment page, Item/Item Categories can be configured to use the Automated Test Decision function based on Source Type. If the Automated Test Decision checkbox is:

- not selected, then the user must decide the Lot-/Serial No. Status manually.
- selected, then the:
  - Lot-/Serial No.-Status on Test Order Finish is not relevant (see Quality Assurance Setup).
  - Status of the tested Lot-/Serial No. will be calculated using the Automated Test Decision function.

Test Incident Status Change from Ongoing to Archived

When a test incident is archived, the Lot-/Serial No. Status is determined by the following scenarios:

- If all orders have an Inspection Result = *Item are OK*, then select the Lot-/Serial No. Status with option *Accepted*.
- If all orders have an Inspection Result = *Item are not OK*, then select Lot-/Serial No. Status with option *Denied*.
- If one order or more have an Inspection Result = *Unspecified*, then select the Lot-/Serial No. Status with option *Unspecified*.
- If one order or more have an Inspection Result = *Item are OK* or *Item are not OK*, then select Lot-/Serial No. Status with option *Unspecified*.

Example

Possible combinations and consequences when using the Automated Test Decision function are described in the following table.

Description	Test Order 1	Test Order 2	Test Order 3 (Repeat Order)	Lot-/Serial No. Status
1x Test Incident / 1x Test Order	Items are OK			Released

Description	Test Order 1	Test Order 2	Test Order 3 (Repeat Order)	Lot-/Serial No. Status
1x Test Incident / 1x Test Order	Items are not OK			Blocked
1x Test Incident / 1x Test Order	Unspecified			Quarantine
1x Test Incident / 2x Test Order	Items are OK	Items are OK		Released
1x Test Incident / 2x Test Order	Items are not OK	Items are OK		Quarantine
1x Test Incident / 2x Test Order	Unspecified	Items are not OK		Quarantine
1x Test Incident / 2x Test Order	Unspecified	Unspecified		Quarantine
1x Test Incident / 1x Test Order + Repeat Order	Items are OK	Items are OK	Items are OK	Released
1x Test Incident / 1x Test Order + Repeat Order	Items are not OK	Items are not OK	Items are not OK	Blocked
1x Test Incident / 1x Test Order + Repeat Order	Items are not OK	Items are not OK	Unspecified	Quarantine
1x Test Incident / 1x Test Order + Repeat Order	Items are not OK	Items are OK	Items are OK	Quarantine
1x Test Incident / 1x Test Order + Repeat Order	Items are OK	Items are OK	Items are not OK	Quarantine
1x Test Incident / 1x Test Order + Repeat Order	Items are OK	Items are OK	Unspecified	Quarantine
1x Test Incident / 1x Test Order + Repeat Order	Unspecified	Unspecified	Unspecified	Quarantine

Feedback

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Test Order Comparison

When the testing from a Test Order has failed, the lot may be sold to a specific customer that has different specifications. To run the comparison from a Test Order to see which customer's specifications match the testing results, choose Function > Compare Test Results on the Actions menu.

For example, Customer X and Customer Y have different measurement specifications. Different test plans are set up with the lower and upper limits for each measurement that is acceptable for each customer and are then assigned to the item's Test Plan Assignment (Source Type = *Sales Order* and Source Code = *customer number*).

A Test Order is processed with Width measurements that fail the lower and upper limits defined for both the item's test plan and customer Y test plan. However, the determined value is within the acceptable limits for customer X.

When the Test Order Properties Compare page is opened, all measurement properties for customer Y contain an "X" while the acceptable ranges for customer X are shown.

See Also

Test Plans
Test Plan Assignment on Items and Item Variants
Test Orders
Inventory Overview - Compare Test Results

Feedback

Submit feedback for this page .

Testing History

The Testing History page shows test results for test orders filtered by date, item, item and variant, lot- or serial number.

In addition to Tell Me, the Testing History page is accessible from the following pages:

- Lot No. Information Card
- Serial No. Information
- Lot-/Serial No. Administration
- Inventory Overview

Upon opening the Testing History page from Tell Me, no entries are shown in the Lines section. In the Filters section, enter the necessary information for filtering the lines. If existing filters are removed, all test order history is shown.

In the Lines section, the Test Properties (code and description) are listed and the existing Test Orders are shown as columns, with the test results for the specific determined (measured) values for the test properties. Test Property Short and Long Text can be shown via the Personalize feature.

As with other matrix pages, you can cycle through the test orders using the Previous/Next Set and Previous/Next Column actions.

The Related menu has options for opening a list of all Lot No. Information, Serial No. Information, and Item Tracing entries relating to the filtered test orders. If no filtering is set, the Lot No. Information List and Serial No. Information List pages will open with all lot-/serial numbers from the existing test orders while the Item Tracing page remains empty.

See Also

Information Card
Item Tracing

Feedback

Submit feedback for this page .

Lot Suggestion

The Suggest Lots function provides a list of acceptable lots based on test property set limits and test plan assignment. This function is available on Sales Orders and Prod. Order Components.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Learn how to suggest lots on sales order lines.	Suggest Lots on Sales Order Lines
Learn how to create new test plans based on different test results to suggest other available lots.	Order-specific Lot Requirements
Learn how to create new test plans for production order components to suggest other available lots.	Suggest Lots on Production Order Components

Feedback

Submit feedback for this page .

Suggest Lots on Sales Order Lines

Lots that match a customer's specification can be selected on a Sales Order line. On the Lines FastTab, choose Line > Quality Assurance > Suggest Lots.

The Lot Selection page opens for items that use Lot No. Information and if lots are available for the customer.

To view the test results that the original Test Order is based on, the Test Order Properties Compare page can be opened from the Lot Selection page by choosing Related > Lot No. > Test Result.

In the Lot Selection page, select one or more lots and then choose the OK button.

The Item Tracking for the required quantity is automatically created using the marked lot numbers as long as the quantity is available.

In addition, the assigned quantity is reserved for the Sales Order.

Important

Only lots with Status (Lot/SN) = *Released* are transferred to Item Tracking and are automatically reserved.

Feedback

Submit feedback for this page .

Order-Specific Lot Requirements

In addition to suggesting lots based on Test Plans at the customer level, it is possible to base the suggestion on the sales order line level.

This function allows users to copy the existing sales order Test Plan to a sales order line and edit the accepted values or tolerances (upper/lower limit) of each property. This criterion will be used in the Suggest Lots function to search for lots in inventory that fulfill the accepted value or that are within the tolerance.

Example

A customer orders 250 units of an item that has 300 units on hand in three lots. This customer has defined that net weight must be between 200–205 but only two of the lots meet this criterion and are available in the Lot Selection page. Therefore, 50 units cannot be fulfilled. The customer decides that a slight variance is acceptable so the entire order can ship immediately.

1. On the Lines FastTab of the Sales Order, choose Line > Quality Assurance > Order-specific Test Plan. The Test Plan Assignment page opens with an Order-specific line that uses the customer-specific Test Plan in the Test Plan No. field.
2. Choose the Copy Test Plan action. A new test plan is created from the customer-specific test plan and is inserted into the Test Plan No. field.
3. Choose the Customize Test Plan action to make the order-specific changes.
4. In the Test Plan Card page, update information on the General FastTab as needed.
5. Select the first line and then choose Property Set > Card on the Lines FastTab.
6. In the Lower Limit field for the net weight test property field, change the value from 200.00 to 198.00.
7. Close the Test Plan Prop.Set Card page.
8. On the General FastTab of the Test Plan Card page, enter a date in the Valid from field and then change the Status to *Certified*.
9. Choose the Close button to close the Test Plan Card page and then close the Test Plan Assignment page.
10. On the Sales Order, choose Line > Quality Assurance > Suggest Lots on the Lines FastTab. Now all three lots are displayed in the Lot Selection page since each meet the criteria for this Sales Order line.
11. Select the two lots that met the criteria to take full inventory from these lots first and then run the function again to select the remaining 50 from the last lot to fulfill the order.

Feedback

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Suggest Lots on Production Order Components

Lots can also be suggested based on component consumption. To use this feature, the following setup must be completed:

- On the component item's Test Plan Assignment – add a line with Source Type = *Component*, relevant testing attributes (Item Test Order Option, Sample Method, Inspection Severity), and leave the Test Plan No. field blank.
- On the produced item's Production BOM – assign a default Test Plan to the component item. This test plan will be copied to the Test Plan No. field on the Prod. Order Component line for each production order.

Similar to the order-specific lot requirement functionality, the default test plan can be copied to a new test plan and modified for a Prod. Order Component using the Copy Test Plan and Customize Test Plan actions on the Quality Assurance menu. The Test Plan is used to enable comparison with existing lot testing results based on the specific Test Properties in both the default Test Plan and current one for the production order component. The Test Properties are compared to determine whether a lot that is generally tested as "Not OK" is valid for the component. Only the lots in stock with the same Location Code are taken into consideration and will be retested.

Different parameters can be set up for each customer by adding lines in the Test Plan Assignment. For example, testing can be done on item level for one customer and then tested on a lot number basis for another customer.

Additionally, it is possible to create a component-based Test Order.

See Also

Order Specific Lot Requirements

Feedback

Submit feedback for this page .

Sample Planning

Sample planning divides Test Orders into samples and provides the ability to do more than one test controlled by a number of Test Orders instead of one. It uses a Sample Occurrence Code that is defined on the Sample Occurrences page as well as a Sample Size Chart that defines an algorithm to calculate the number of samples to take and create a corresponding number of test orders.

All Test Orders originating from a Sample Planning are gathered on a Test Instance and displayed in the Test Incident Card page.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up Sample Occurrences to control the number of test orders to be created.	Set up Sample Occurrences
Set up sample size charts for determining the number of samples needed.	Sample Size Charts
Learn how test orders are created based on sample planning settings.	Create Test Orders
Learn about Test Incidents and how to record values for the test orders.	Test Incidents
Learn how to print Sample Instruction report from a Test Incident and a Spare label from a Test Order.	Print Sample Instruction Report and Label

Feedback

Submit feedback for this page .

Sample Occurrences

The Sample Occurrence is used with Sample Planning to control the number of Test Orders to be created. Once the number series is defined and assigned in the Quality Assurance Setup page, the Sample Occurrences must be created.

To set up sample occurrences

1. Choose the icon, enter Sample Occurrences, and then choose the related link.
2. Choose the New action to create a new occurrence or the Edit action to open an existing occurrence.
3. In the Code and Description fields, enter a unique code and brief description for the sample occurrence.
4. In the Test Order per each (Units) field, enter the quantity for that one Test Order is created.
   For more information, see Relative and absolute values.
5. In the Absolute No. of Test Orders field, enter a number of Test Orders that will be created regardless of the quantity on the source document line; works in combination with the value in the Test Order per each (Units) field.
   For more information, see Relative and absolute values.
6. The Status field indicates the current state of the sample occurrence. The options are *New*, *Under Development*, *Certified*, and *Closed*. Only certified Sample Occurrences can be assigned to a Sample Planning in the Test Plan Assignment, and therefore, used for Test Order creation.
7. The External Document Name field identifies a document file that relates to the sample occurrence.
   - If a file exists, choose the Show External Document action to open the file.
   - To upload a file using the standard Import page, choose the ellipsis button or choose the Upload External Document action. For more information, see Document Storage.

   > **Note**
   > **This field is displayed only if the Document Storage Point field = *Per Record* in the Quality Assurance Setup page.**

8. In the Sample Location field, select a location for the sample. This can be filled in

with any value or a Location Code can be selected from the Location table.

9. In the Sample Size Template Chart Code field, enter the code of the template to determine samples needed for the lot ranges.
   On the Actions menu, choose Show Sample Size Template Chart action to view the chart.
10. The remaining FastTabs are used for instructing users how to manage the sample:
    - In the Sample Taking FastTab, enter the instructions for taking the sample.
    - In the Sample Handling FastTab, enter the instructions for handling the sample.

If the Document Storage Point field = *Document File* in the Quality Assurance Setup page, then the Document Files FactBox will be accessible for attaching new and viewing existing Sample Occurrence documents. For more information, see Document Storage.

Relative and absolute values

The Sample Occurrence contains a relative and an absolute value of Test Orders to be generated. The relative number of Test Orders depends on the quantity of the source document position for which the Test Order(s) are created.

Example

If 100 is entered in the Test Order per each (Units) field and the source document line contains a quantity of 200, two Test Orders are created.

Entering 1 in the Absolute No. of Test Orders field, along with the 100 in the Test Order per each (Units) field, will generate one Test Order per 100 Units plus one extra Test Order. Therefore, with a total quantity of 200 in the source document line means that three Test Orders are created.

In general, the number of test orders created based on source document line quantity follows this pattern:

From Quantity	To Quantity	No. of Test Orders
0	99.99	1
100	199.99	2
200	299.99	3
300	399.99	4
...		

See Also

Sample Size Charts

Feedback

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Sample Size Charts

Sample Size Charts replace the Oeser/Strohecker functionality in previous versions of COSMO Quality Assurance. With the Sample Size Charts functionality, you can define different, more complex sample configurations based on item / item variant, item category, and unit of measure. All source types in the Test Plan Assignment page are supported and the chart can be combined with other methods of the Sample Occurrence, such as the Absolute No. of Test Orders. The number of samples determine the number of test orders created.

The following video provides an overview of the Sample Size Charts function.

Set up sample size charts for sample planning

The pattern of sampling to identify the number of samples to take and to create a corresponding number of test orders are defined in the Sample Size Template Charts page for reuse in various configurations or manually entered in the Sample Size Charts page accessed from the sample planning.

Sample Size Template Chart

1. Choose the icon, enter Sample Size Template Charts, and then choose the related link.
2. Choose the New action to create a Sample Size Template Chart.
3. In the Code field, enter a unique identifier for the chart.
4. In the Description field, enter a short description of the chart.
5. In the From Lot Size field, enter the lower lot size that a sample is needed.

6. In the To Lot Size field, enter the higher lot size that a sample is needed.
7. In the Sample Size field, enter the size of the sample needed for the specified lot range.
8. Go to the next line and enter the lot size range and sample size for the range.
9. Repeat step 8 for all lot ranges relevant for this template.

Add sample size template chart in sample occurrence

The Sample Size Template Chart can be assigned in the Sample Occurrence Card. The values from the template can be changed per sample planning.

1. Choose the icon, enter Sample Occurrences, and then choose the related link.
2. Create the sample occurrence or open the existing one to add the sample size template chart.
3. In the Sample Size Template Chart Code field, enter the relevant chart code.
4. On the Actions menu, choose the Show Sample Size Template Chart action to view the chart.

> **Note**
> **Making changes to the chart here will also change the source template. Changes for individual sample plannings must be done in the chart accessed from the Sample Planning page.**

If the Absolute No. of Test Orders is set in the Sample Occurrence, the number of test orders created from the sample planning will extend the number that is required from the sample occurrence. For example, if the Absolute No. of Test Orders field is set to *2*, and two test orders are determined from sample planning, then four test orders will be created.

Sample Size Chart

The sample size chart can be opened for manual entry or editing from the sample planning in the Test Plan Assignment page or directly in the Sample Plannings page.

Add sample size chart to sample planning in test plan assignment

1. Choose the icon, enter Items, and then choose the related link.
2. Create the item or locate the existing item to add sample planning.
3. In the Quality Assurance menu, choose the Test Plan Assignment action.
4. Fill in the fields as necessary, leaving the Sampling Method and Inspection Severity Code field blank.
5. Choose the Sample Planning action.
6. In the Description field, enter a short description.

7. In the Unit of Measure Code field, enter the unit of measure relevant for this sample planning.
8. In the Sample Occurrence Code field, enter the sample occurrence, if one exists for this sample planning.
   If a sample size template chart has been assigned to the Sample Occurrence, it will be used for this sample planning but can be edited as needed.
9. In the Sample Size Relation field, choose if the sample size is determined based on the Quantity or No. of Units field in the source document.
10. Choose the Sample Size Chart action.
11. In the From Lot Size field, enter the lower lot size that a sample is needed.
12. In the To Lot Size field, enter the higher lot size that a sample is needed.
13. In the Sample Size field, enter the size of the sample needed for the specified lot range.
14. Go to the next line and enter the lot size range and sample size for the range.
15. Repeat step 14 for all lot ranges relevant for this sample planning.

Add sample size chart to sample plannings

Instead of starting in the Item Test Plan Assignment, you can create sample planning directly in the Sample Planning page. To work in this view, you must use the Personalize feature to add the Source Type field and any of the following fields: Item No., Item No. + Item Variant or Item Category Code.

1. Choose the 🔍 icon, enter Sample Plannings, and then choose the related link.
2. Choose the New action.
3. In the Description field, enter a brief description for the sample planning.
4. Fill in the Item No., Item Variant, and/or Item Category Code fields.
5. In the Unit of Measure Code field, enter the unit of measure the sample planning is based on.
6. In the Sample Occurrence Code field, enter the sample occurrence if one exists for the sample planning.
   If a sample size template chart has been assigned to the Sample Occurrence, it will be used for this sample planning but can be edited as needed.
7. In the Sample Size Relation field, choose if the sample size is determined based on the Quantity or No. of Units field in the source document.
8. In the Source Type field, enter the source document that is used to create the needed sample, such as Purchase Receipt.
9. Choose the Sample Size Chart action.
10. In the From Lot Size field, enter the lower lot size that a sample is needed.
11. In the To Lot Size field, enter the higher lot size that a sample is needed.

12. In the Sample Size field, enter the size of the sample needed for the specified lot range.
13. Go to the next line and enter the lot size range and sample size for the range.
14. Repeat step 13 for all lot ranges relevant for this sample planning.

See Also

Test Plan Assignment on Items and Item Variants
Sample Occurrences
Create Test Orders

Feedback

Submit feedback for this page .

Create Test Orders

When a document type with Sample Planning is processed for an item, multiple Test Orders are created based on the Test Plan Assignment, Sample Planning, and Sample Occurrence. The test orders are accessible from the Test Incidents or Test Order List.

Example – Sample Occurrence

If a sample occurrence that has Test Order per each (Units) = *100* and Absolute No. of Test Orders = *1* is assigned to an item that requires test orders upon purchase receipt, then three test orders are created when a purchase receipt is posted for Quantity = 200. This is because two test orders were created based on the per unit settings (2 x 100) and an extra one was created from the absolute number setting.

Example – Sample Planning, Sample Size Relation = Quantity

In Sample Planning, if the Sample Size Relation is set to *Quantity* and the chart defined below is assigned to an item that expects samples when posting a purchase receipt, then *four* test orders are created when the purchase receipt is posted for Quantity = *75*, No. of Units = *5*. This is because the Quantity falls between the 50-100 lot range; the No. of Units is not part of determining the sample.

From Lot Size	To Lot Size	Sample Size
0	10	1
11	25	2
26	50	3
50	100	4

Example – Sample Planning, Sample Size Relation = No. of Units

Using the same chart above, if the Sample Size Relation is set to *No. of Units* and the chart is assigned to an item that expects samples when posting a purchase receipt, then *one* test order is created when the purchase receipt is posted for Quantity = *75*, No. of Units = *5*. This is because the No. of Units falls between the 0-10 lot range; the Quantity is not part of determining the sample.

See Also

Test Incidents
Test Orders

Feedback

Submit feedback for this page .

Test Incidents

Each level that is executed for the Test Plan Assignment (for example, the Lot No.) will get a new Test Incident document.

Test Incidents are opened from the Lines FastTab (Line > Test Incidents or Line > Quality Assurance > Test Incidents) of the source document from which the test order was generated.

On the Test Incident Card, the General FastTab contains the information that is common for all of the Test Orders. The Lines FastTab shows the list of Test Orders related to this Test Incident. The actions in the different menus on the action bar and the Lines FastTab are similar to actions on a Test Order.

The External Document, Sample Taking Instruction, and Sample Handling Instruction are copied from the Sample Occurrence to each Test Incident where each can be edited.

The Test Orders created for one level contain the Test Incident No. and a Test Incident Order No. and are shown together on the Test Plan Source FastTab in the Test Order Card.

Value Recording

On the Test Incident Card, the Test Orders can be released for value recording in two ways:

- All by choosing Release Test Orders on the Home menu.
- For individual test order by selecting the line and then on the Lines FastTab, choosing Function > Release.

On the Home menu, choose the Value Recording action to open the Value Recording Worksheet filtered on the Test Incident. The view can be sorted to the Test Order Properties for combined recording of all samples.

After value recording has been executed, the Test Results for all Test Orders of a Test Incident can be compared in a matrix view. On the Test Incident Card, choose the Compare Test Results action on the Home menu.

Further processing of the test orders, such as finishing a test order, can be handled by choosing Function > Finish on the Lines FastTab, or the test order can be opened by choosing Line > Test Order > Card to open the Test Order.

See Also

Operator-Centric Recording of Quality Measurements

Feedback

Submit feedback for this page .

Print Sample Instruction Report and Label

A Sample Instruction report can be printed from the Test Incident by choosing the **Sample Instruction** action on the **Reports** menu.

A Spare Label can be printed from the Test Order Card by choosing the **Sample Spare Label** action on the **Reports** menu.

Feedback

Submit feedback for this page .

Test Order Scheduling

Testing is an operation of quality control. Like other operations, this activity needs to be scheduled and monitored. Scheduling of test activities is the process of arranging, controlling, and optimizing work and workloads in a quality control process. Scheduling is used to coordinate activities with other operations.

Testing is a tool that can have a significant impact on the efficiency of other supply chain processes, like manufacturing and inventory management.

The scheduling function in COSMO Quality Assurance is available on Test Orders and Test Incidents. Additionally, Test Activities can be assigned to Test Order Properties. Therefore, when Test Orders are created, the Test Orders can be scheduled based on the longest Test Activity.

Rescheduling can be initiated from a batch (also available from Test Order/Test Incident) or by changing the Starting Date/Time on the document.

In COSMO Quality Assurance, the scheduling function is currently a tool for planning only; primarily, to calculate the start and end times for the following processes:

- Incoming good inspection
- Manufacturing inspection

The setup and calculation for these processes are described in this topic.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Learn about and set up Test Activities and Test Activity Groups.	Test Activities Overview and Setup
Set up the master data for use with test order scheduling.	Master Data Setup
Get an overview of the incoming goods inspection process.	Incoming Goods Inspection
Get an overview of the manufacturing inspection process.	Manufacturing Inspection
Learn how to reschedule test orders and test incidents.	Rescheduling

Feedback

Submit feedback for this page .

Test Activities Overview and Setup

Test Activities are copied through the schedule of record creation like it is executed for Test Properties: Test Activity → Test Plan Activity → Test Order Activity.

While the Test Activity contains general information like the Code and Description fields, the Test Plan Activity contains the Execution Time and Exec. Time Unit of Meas. Code fields.

The Test Order Activity uses the following fields to store the planned time frame based on the Execution Time:

- Starting Date
- Starting Time
- Ending Date
- Ending Time
- Starting Date-Time
- Ending Date-Time

> **Note**
> **These fields are available as filters in the Change Test Order Status function.**

The time-based fields listed above are visible in the following pages:

- Test Order Card, Planning FastTab
- Test Order List
- Test Incident Card, Planning FastTab
- Test Order Activities

Test Activities Setup

Test Activities define how to operate testing and are used in the Test Order Scheduling process to relate one or more Test Properties to a group that represents the test step. For more information, see Master Data Setup.

Test Activity Groups are used to classify Test Activities and can be set up prior to or as needed when creating test activities.

To create test activity groups

1. Choose the icon, enter Test Activity Groups, and then choose the related link.

2. Choose the New action.
3. In the Code and Description fields, enter a unique code and description for the test activity group.
4. Go to the next line and add another test activity group.

To create test activities

1. Choose the icon, enter Test Activities, and then choose the related link.
2. Choose the New action.
3. Fill in or update the fields as described in the following table.

Field	Description
Code/Description	Unique identifier and short description of the test activity.
Test Activity Group Code	Indicates the category of test activity for grouping purposes.
Resource No.	Indicates the standard Microsoft Dynamics 365 Business Central Resource to be used for the Activity. Resources are linked to work centers in order to use the Work Center structures like capacities. Work Center Capacities are used instead of Resource Capacities for Test Order Scheduling.
Work Center No.	Indicates the Work Center to be used for the activity, defaults from the linked Resource No. The use of the Work Center results in usage of related working time structures so that no Activities are planned outside of the working time.
Work Center Group Code	Defaults from the Work Center specified in the Work Center No. field.
Exec. Time Unit of Measure Code	Defaults from the Work Center specified in the Work Center No. field.

Feedback

Submit feedback for this page .

Master Data Setup

This topic describes the various master data set up required to use Test Order Scheduling.

Quality Assurance Setup

To calculate the dates for all inspection processes, the Production Order calculation is used based on Test Activities. Therefore, a Simulated Production Order is created along with each Test Order as a temporary calculation. This production order uses a dummy item and default work center to handle the calculations, and then is deleted once the starting/ending dates are added to the Test Order.

The fields needed to use the production order calculation function are defined in the Quality Assurance Setup page.

The dummy item defined in the Test Sched. Dummy Item No. field is used as the item for the Simulated Production Order and the Work Center defined in the Default Sched. Work Center No. field is used as the default if one is not assigned later in the scheduling process. The number series to be used for the temporary calculation is defined in the Simulated Order Nos. field.

Resources

Resources are assigned to specific Test Activities in the Test Activities page (see Test Activities). There is no special set up in the Resource Card, other than the Work Center No. field, which links the resource to a work center for the test activities. The Work Center No. field is not shown by default but can be added using the Personalize feature.

The Resource and related Work Center are automatically assigned when an activity is assigned to Test Plan Properties. For more information, see Test Activities in Test Plan.

Work Center

There is no special set up in the Work Center Card, but it needs capacity for production order calculation. If no work center is assigned in the Resource, then the Work Center assigned in the Default Sched. Work Center No. field in the Quality Assurance Setup page is used.

> **Important**
> **The work center assigned to the Default Sched. Work Center No. field in the Quality Assurance Setup page is the same as the one assigned to a Resource for**

Test Order Scheduling.

Items

In addition to the dummy item needed for calculation, the raw material item to be tested has special set up requirements as well.

The dummy item includes basic information needed to generate the proper calculation. The setup should include posting groups, rounding precisions higher than 1, replenishment from Production Orders, and item tracking.

The raw material item used for testing is set up as any other purchased item with planning process and item tracking.

Item Test Plan Assignment

As usual, an item for testing must have a Test Plan Assignment. In this case, an incoming goods inspection needs to be defined.

The Test Wait Time and Wait Time Unit of Meas. Code fields define if additional time needs to be added to the scheduled testing time to accommodate the period of, for example, goods arrival to the inspection area.

Test Activities in Test Plan

In the Test Plan Card, the activities are defined in the Test Plan Activities page.

The Test Activities are related to resources and work centers and includes the specified execution time for testing.

When adding the Test Plan Activities, the Resource/Work Center combination is automatically populated from the Test Activity. The only field specific to the Test Plan Activity is the Execution Time.

Once the Test Activities are defined for the Test Plan, the activities can be assigned to the specific Test Properties in the Test Plan Property Set lines.

Feedback

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Incoming Goods Inspection

When goods are received at a company's warehouse, the time it takes from arrival to the testing needs to be considered in the testing process. Individual testing processes take different amounts of time as well and need to be considered in the testing process.

With Test Order Scheduling, these time frames are collected based on the test activities assigned to the test plans, and then start and end dates for the testing process are calculated based on the duration of those times.

Feedback

Submit feedback for this page .

Manufacturing Inspection

The same functionality of Test Order Scheduling is also available in manufacturing inspection, except the test activities can be set up to start at the beginning, in parallel, or at the end of the operation. This set up is defined in the Test Order Relevance field in the Routing lines. The options are:

- Start – The Test Order begins with the starting of the Operation and will be executed independently.
- Ending – The Test Order begins with the Ending (Date/Time) of the Operation and will be executed independently.
- Process – The Test Order accompanies the Operation or the Operation is created for the testing process:
  - Test Order Starting Date-Time and Ending Date-Time must concur with the Starting Date-Time and Ending Date-Time of the operation. When the Test Order Activity times are calculated, these values are copied to the Test Order Activity.
  - Refresh Prod. Order must recalculate the related Test Order.

The Test Plan Assignment for the routing operation has three test properties: two are assigned on the first Test Property Set and one on the second Test Property Set.

After creation of the Test Order, the Starting and Ending dates/times are calculated based on the Source Type and the duration in the Test Order Activities.

The Starting Date-Time for a Prod. Order Routing Line is determined as described above. If Test Order Relevance = *Process* is used, the Ending Date-Time is determined from the Ending Date-Time of the Prod. Order Routing.

Feedback

Submit feedback for this page .

Rescheduling

It is possible to reschedule Test Orders and test incidents from the respective pages.

Important
Changing the Start Date in either the Test Order or Test Incident will cause the automatic recalculation of the Test Order(s).

Reschedule Test Orders

In the Test Order List page, select a single or multiple Test Orders that need to be rescheduled and then choose the Reschedule Test Orders action. All selected Test Orders that have Status = *Created* are updated as follows:

- The Starting Date-Time is updated
- The Ending Date-Time is recalculated (by validating Starting Date-Time)

Reschedule Test Incidents

In the Test Incidents page, select a single or multiple test incidents that need to be rescheduled and then choose Reschedule Test Incidents on the action bar. All selected Test Incidents with Test Orders that have Status = *Created* are updated as follows:

- The Starting Date-Time is updated
- The Ending Date-Time is recalculated (by validating Starting Date-Time):
  - On the Test Order
  - On the Test Incidents

Since the Test Incident is updated from the underlying Test Order, all Test Orders for an Incident must start at the same date/time and end at the same date/time. Calculation is then based on the first Test Order and the result is copied to the other Test Orders with the same Incident No. and the Test Incident itself.

Tip
When the Starting Date-Time is changed in a Production Order, the Date-Time will be synchronized when the Reschedule Test Incident function is run.

Feedback

Submit feedback for this page .

Lot-/Serial No. Administration

The Lot-/Serial No. Administration page documents and manages all lot numbers that have a Lot No. Information Card and serial numbers that have a Serial No. Information Card.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Enter the base filters for the lot-/serial number changes and modify lot- and serial number information, such as status or dates.	Modify Lot- and Serial Number Data
Learn when lot splitting is possible and how to split a lot on sales return.	Lot Splitting
Post the quantity of one lot to another.	Lot Joining
Learn about the actions in the Lot-/Serial No. Administration page.	Lot-/Serial No. Administration Menus

See Also

Information Card

Feedback

Submit feedback for this page .

Modify Lot- and Serial Number Data

Before making changes to the lot-/serial number information, you must first set the proper filters and run the Get Records function.

> **Note**
> **If the number of filtered records exceeds the threshold defined in the Lot-/Serial No. Administration Record Threshold field in Quality Assurance Setup, then a message will open stating that this process will take some time. At this point, you can continue the process or cancel it and add more filters to reduce the number of records.**

To enter filters for lot-/serial number data changes

1. Choose the icon, enter Lot-/Serial No. Administration, and then choose the related link.
2. In the top section, enter the filter criteria for restricting the display to certain lots only.

   > **Note**
   > **The Entry Date Filter field is not visible by default but can be added via the Personalize feature. Close and reopen page to enter a specific entry date or date range.**

3. Choose the Get Records action to populate the lines.

Changeable lot-/serial number data

In each line, almost all lot- or serial number data can be changed with regard to possibly activated access authorizations and verifications. The following lot- or serial number data can be changed:

- Lot Number
- External Lot Number
- Serial Number
- Status (Lot/SN)
- Entry Date
- Expiration Date
- Quarantine Date

- Retest Date
- Warranty Date

To modify lot-/serial number data

To modify data, the Quantity field must be populated and the specific action must be filled in.

The Quantity field can be filled in manually or automatically with the inventory of the Lot No./Serial No. during update or always based on the setting in the Autofill Quantity field in the Filter section. The options are:

- *None*: the Quantity field is always filled in manually.
- *Update*: the Quantity field is filled in when any changes are made to the line, e.g., a new status or quarantine date is entered.
- *All*: the Quantity field is filled in when either changes are made to the line or the Get Records action is run.

To modify non-lot or serial numbers

Depending on the specific action, a field (such as New Status (Lot/SN)) must be filled with the desired new value. With one alteration process, you can change various data records within one step – such as Status and Expiration Date – as long as you have the required authorizations (see QA Permissions).

Example

Only 100 units out of 500 of an item have been approved for release. In the Quantity field, you enter 100 and then enter *Released* in the New Status (Lot/SN) field. After posting, a new lot is created for the 100 released units and the original lot is reduced by 100.

To modify lot or serial numbers

When changing the Lot No. or Serial No., you must enter the complete quantity in the Quantity field. This means that lot splitting is not possible when changing these fields (see Lot Splitting). Furthermore, you cannot change another field in the same step as changing the field's lot- and serial numbers.

Example

Lot number LOT0005 has 200 units and for various reasons the number needs to be changed to LOT0010. In the Quantity field, you enter *200* and then enter *LOT0010* in the New Lot No. field. After posting, LOT0005 has a quantity of 0 and LOT0010 has a quantity of 200.

To post changes

Once the changes are entered, select the line(s) to post and then choose the Post action to complete the modification.

A comment about the change can be entered during posting if the Skip comments update on Status posting toggle is turned off in the Quality Assurance Setup page. Depending on the setting in the Transfer Comments on Rename field on the Item Tracking Code Card, existing comments can be transferred (copied or moved or copied/moved with a new comment) to the new Lot- or Serial No. Information Card if a lot- or serial number is created through rename or split. For more information, see Transfer Comments on Rename.

Closing the Lot-/Serial No. Administration page

If you close the page before changes are posted, filter settings and line changes are saved and retrieved when the page is reopened. A message opens when the page is not empty on close, stating that records will be read again on opening.

Feedback

Submit feedback for this page .

Lot Splitting

If – for partial quantities of lots – data changes are done (such as changes of status, expiration date, entry date and so on), a new number is automatically assigned for the partial quantity.

The number assignment for data records containing lot- and serial numbers happens according to the logic in the following table.

Lot No.	Serial No.	Number Assignment
▯		New lot number (from the lot number series) for the split quantity.
▯	▯	No split possible because serial numbers cannot be split.
	▯	No split possible because serial numbers cannot be split.

Partial Lot Splits

If a portion of a lot needs to be split and assigned to a new lot, you can enter a quantity *lower* than the Lot Inventory in the Quantity field and then enter a new lot number in the New Lot No. field.

Lot Split on Sales Return

With the Lot Split function on a Sales Return Order, the returned quantity can be related to a separate sub-lot to track the returned quantity from a part of the original lot that is still in stock.

To activate the function for all lot tracking codes, turn on the Automatic Lot Split on Return toggle in the Quality Assurance Setup page. To activate the function for specific item tracking codes, turn on the Automatic Lot Split on Return toggle on the Misc. FastTab in the Item Tracking Code Card page.

> **Note**
> **The setting in the Item Tracking Code Card overrules the setting in the Quality Assurance Setup page.**

If, for example, a sales order was shipped to a customer for 200 units of an item. The customer returns 100 units of the product due to damages in shipping. In the Sales Return Order, the lot is split automatically by the addition of "-1" to the lot number.

Feedback

Submit feedback for this page .

Lot Joining

Based on the selection in the Update Strategy for Lot Info field, it is possible to post the quantity from one lot to another in the Lot-/Serial No. Administration page by either adding only the quantity from the source lot or adding the lot quantity and overwriting the lot information in the target lot.

The Update Strategy for Lot Info field is available on the Quality Assurance Setup (general setup) and the Parent Company field is blank in the Item Category Card (special setup). If no special setup exists, then the general setup is used.

The options in this field determine how the lots are joined:

- Always Ask – opens a selection window on posting when a target lot exists, asking the user to add the quantity or overwrite the lot. This selection window opens if no general/special setup is found.
- Add Quantity – adds only the quantity from the source lot to the target lot; the lot information for the target lot is unchanged.
- Overwrite – overwrites the lot information of the target lot with the source lot and adds the quantity.

Regardless of the selection, comments are required for both lots to complete posting in the Lot-/Serial No. Administration page; there is no choice on whether to add comments or not in the Item Tracking Comments page.

See Also

Transfer Comments on Rename

Feedback

Submit feedback for this page .

Lot-/Serial No. Administration Menus

The additional actions on the menus of the Lot-/Serial No. Administration page are described in the following sections.

Create Test Order

On the New menu, choose the Create Test Order action to create an inventory test order for a lot- or serial number directly from the page as long as setup was completed for the respective item in the Test Plan Assignment page (see Test Plan Assignment on Items and Item Variants).

The creation of inventory test orders mainly serves the inventory control (such as when a lot has expired and must be extended).

Information Card

Choose the Information Card action to open the Lot No. Information Card or Serial No. Information Card pages, respectively. In these pages, information about a lot- or serial number can be viewed and edited.

The COSMO Quality Assurance-specific fields and actions added to these pages are described in the following sections.

General FastTab

On the Serial No. Information Card page, the Lot No. field displays a lot number if one corresponds to the serial number.

Inventory FastTab

On both pages, the Lot Inventory field displays the available inventory of the lot.

Status FastTab

Unless noted otherwise, the fields on the Status FastTab are the same in both pages and are described in the following table.

Field	Description
Status (Lot/SN)	Current status of the lot- or serial number.
Quarantine Date	Quarantine date of the lot- or serial number. The value is calculated automatically based on the Quarantine Calculation on the Item Card.

Field	Description
Retest Date	Retest date of the lot- or serial number. The value is calculated automatically based on the Retest Calculation on the Item Card. This date refers to the Expiration Date of the lot or serial number and indicates on which date it has to be retested before expiration. Thus, an extension of the expiration date can result.
Expiration Date	Expiration date of the lot- or serial number. The value is calculated automatically based on the Expiration Calculation on the Item Card.
Warranty Date	Warranty date of the lot- or serial number. The value is calculated based on the Warranty Date Formula on the Item Tracking Card.
Entry Date	Entry date of the lot- or serial number, respectively.
External Lot No.	External lot number (vendor lot number). This value is adopted from the value of the item tracking line of the receipt.
Original Lot No.	Original lot number from a split or renamed lot.
No. of Units	Number of units the lot consists of. The value is adopted from the information of the item tracking line in the receipt. This field is not on the Serial No. Information Card page.

Quality Control FastTab

The fields on the Quality Control FastTab display COSMO Quality Assurance information. These fields are the same for both pages and are described in the following table.

Field	Description
Last Test by	ID of the user who has last tested the test order of this lot- or serial number.
Last Test Date	Date when the lot- or serial number was last tested.
Last Test Resp. Center Code	Responsibility center of the last testing of the lot- or serial number.
Last Test Order No.	Last test order number of this lot- or serial number.

Testing History

The Testing History action on either the Lot No. Information Card or Serial No. Information Card pages open the Testing History page, which shows test results for test orders filtered by date, item, item and variant, lot or serial number. The page is opened filtered on the specific item, item/variant, lot number or serial number selected in the Lot

No. Information Card or Serial No. Information Card page.

For more information, see Testing History.

Test Orders

Choose the Test Orders action to open the Test Order List page, which displays the test order(s) that relates to the selected lot line.

Test Incidents

Choose the Test Incidents action to open the Test Incidents page, which displays the test incident(s) that relates to the selected lot line.

Testing History

Choose the Testing History action to open the Testing History page, which shows test results for test orders filtered by date, item, item and variant, lot or serial number. The page is opened filtered on the specific item, item/variant, lot number or serial number selected in the Lot-/Serial No. Administration page.

For more information, see Testing History.

Feedback

Submit feedback for this page .

Customer Certificate

A customer certificate, such as a Certificate of Analysis (COA), is a document provided by manufacturers that verifies the product they manufactured conforms to their customer's requirements. It is important for customers to know that the product they are receiving adheres to their specific parameters and targets, and to ensure that it meets their needs. Customer Certificates help your company prevent costly returns, replacements, or customer complaints.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Learn about the purpose and importance of Customer Certificates.	About Customer Certificates
Learn how information flows starting from the item and ending in the sales process to create a Customer Certificate.	Process Flow
Learn about the general setup needed prior to setting up the testing configurations.	General Setup
Learn how to configure the testing information needed to generate a Customer Certificate.	Configuration
Learn how to create a Customer Certificate, learn about the fields and actions on the Customer Certificate Card, and print a Customer Certificate.	Processing

Feedback

Submit feedback for this page .

About Customer Certificates

This topic describes why a Customer Certificate is so important and the best way to manage them within your company.

What makes up a Customer Certificate document?

For instance, the Food and Drug Administration (FDA) lists specific requirements for each Customer Certificate document your company produces, including:

- Supplier Information: This section contains data regarding the material supplier, including their name, address, and other contact information.
- Materials Identification: The content in this section identifies the material being verified by this Customer Certificate. It usually contains common terms such as lot numbers, product codes, and descriptions.
- Transportation Data: This area generally includes the customer's name and address, original purchase order, or other details such as the item's destination. This content is provided to meet shipping requirements and to help the receiver in confirming the material is authorized and its delivery is anticipated.
- Evidence of Conformance: This section holds the most important information in the Customer Certificate. It states the specific characteristics, test results, or other evidence in terms of industry standards, regulatory requirements, or customer-specific request. In some cases, the performance standards expected will also be noted for reference.
- Signature Data: This last section of the Customer Certificate includes a signature indicating that the evidence presented was reviewed by a qualified and authorized product inspector.

Without each of these sections and data, your Customer Certificate will not count as a legitimate inspection of your product and you may run into legal or business ramifications.

What are Customer Certificates used for?

As mentioned, Customer Certificates are documents meant to prove the products you are manufacturing meet your customers' expectations. With countless items being produced by manufacturers, it is often difficult for a company to seamlessly track materials from the very beginning to the end of the final product process. This means that companies rely more and more on their suppliers to provide quality materials for finished products.

A Customer Certificate goes beyond just acting as a product inspection. With materials rapidly moving to and from different locations, it is necessary to have the shipped material clearly and correctly identified and clarified. In addition to material and container labels, the Customer Certificate serves as an identification document for the status of each product. These documents provide more detailed information than a label generally provides. The Customer Certificate conveys information from a material supplier to a material user about the identity, quality, and purity of that specific material. It is very important for a material supplier to show its customer a trustworthy Customer Certificate so that the customer can understand exactly what type of product they receive. The receiver can also compare the information provided on the vendor's Customer Certificate against its specifications to see whether the material meets the required criteria.

Why does your company need to produce Customer Certificates?

Many manufacturers know there are advantages to creating Customer Certificates but consider them too costly and time-consuming. However, without producing a trustworthy and accurate Customer Certificate, your company could face both business and legal consequences.

Feedback

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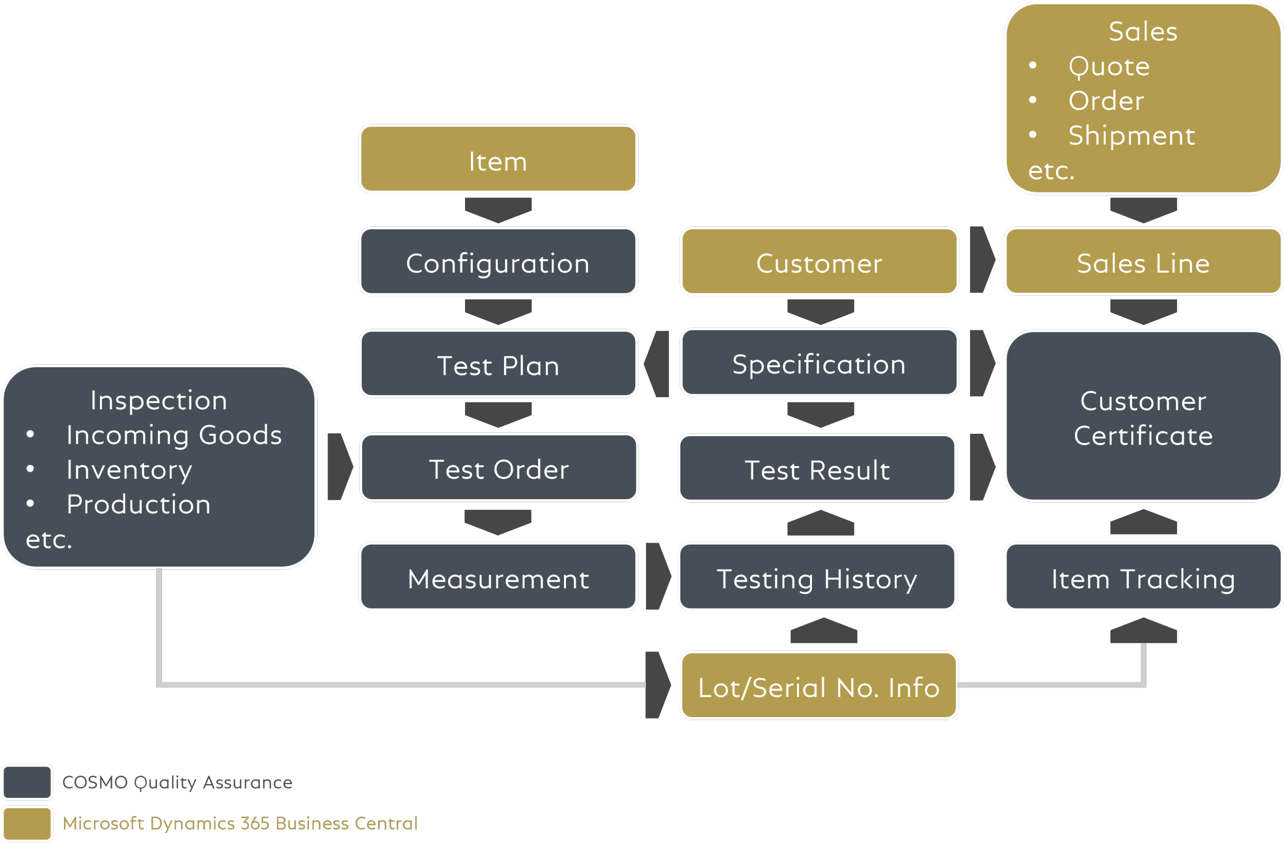
Process Flow

COSMO Quality Assurance uses the standard item, lot/serial number, customer, and sales functionality in Microsoft Dynamics 365 Business Central along with the testing and inspection features of COSMO Quality Assurance to flexibly create simple or complex Customer Certificates based on customer specifications.



Document / Process	Description
Lot/Serial No. Information	All Customer Certificates are related to lot/serial numbers. All navigation starts with the lot/serial number information.
Item / Test Plan	Starting with the item, the test plan is assigned, which is based on the specification from the customer or by a generic specification (assigned via Source Type = *Certificate*).
Test Order	Once the test plan is created, the standard COSMO Quality Assurance testing and inspection functions are performed in the Test Orders.

Document / Process	Description
Testing History	Next, the Testing History provides a consolidated view of all the testing completed for a lot/serial number for comparing results and visualizing complete history. For creating the Customer Certificate, all of the results from the lot/serial number's Testing History are consolidated and can be calculated in various ways. For example, maybe only the last recorded value is needed or an average, minimum, or maximum value of the measurements is needed.
Test Plan / Test Result	The Test Plan is compared to the Test Results to ensure customer specifications have been met, which are then summarized in the Customer Certificate.
Customer Certificate	The Customer Certificate includes the test plan/result comparison – when results were recorded – along with item tracking and customer information from the sales line, including any quote, order, shipment information. This could be necessary if multiple Customer Certificates were sent during the quote, order, or shipping phase. Each Customer Certificate is specific to the customer specifications and can be customized to be as simple or as complex as necessary.

Feedback

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General Setup

Prior to setting up the testing configurations and parameters for generating a Customer Certificate, there are other general settings that must be defined first.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up number series for Customer Certificates and Test Methods.	Quality Assurance Setup
Set up Test Methods for specifying testing of an individual Test Property.	Test Methods
Allow printing of Customer Certificates based on Lot-/Serial No. Status.	Lot-/Serial No. Status
Authorize users to sign Customer Certificates.	User Setup
Set up long-term storage condition information.	Inventory Conditions
Define report IDs for Customer Certificate and Test Report.	Report Selections

Feedback

Submit feedback for this page .

Quality Assurance Setup

In the Quality Assurance Setup page, define the Customer Certification Nos. and Test Method Nos. number series needed for creating Customer Certificates and Test Methods in the Numbering FastTab.

See Also

Customer Certificate Card
Test Methods

Feedback

Submit feedback for this page .

Test Methods

Test Methods specify how to process the testing of a property. It could refer to a standard, like ISO.

Test Method Card

The Method Card is accessed from the Test Methods page, which is opened from the Role Center (Test Planning > Test Methods) or Tell Me by choosing the icon, entering Test Methods, and then choosing the related link.

Open the Method Card by choosing an existing test method or choosing the New action to create one.

The fields on the Method Card page are described in the following table.

Field	Description
No.	Specifies a unique identifier for the Test Method.
Revision	Indicates the revision number of the Test Method, which is updated by the Create New Revision action.
Description	Specifies a short description of the Test Method.
Starting Date	Specifies the date the Test Method becomes active for use. If multiple revisions exist, then the entry with the most recent valid date will be selected.
Text	Indicates the extended text that is used in the Customer Certificate line. This text can be translated in the Extended Text field on the Test Translation page via the Translations action.
Text 2	Additional information about the text method with a 2048 character limit. Text can be freely entered in the field or choose the ellipsis button to open the Text Editor, in which you can enter as much text as needed within the noted limit, which you can see via the character count at the bottom. Additionally, this text can be translated in the Extended Text 2 field on the Test Translation page via the Translations action.

The actions on the Method Card page are described in the following table.

Menu	Action	Description
New	Create New Revision	Creates a new version of the Test Method.

Menu	Action	Description
	Translations	Translates the Test Method that can be printed on the Customer Certificate.

To create a new revision

1. Open the Test Methods page and choose the test method that needs a revision to open the Method Card.
2. On the New page, choose the Create New Revision action.
3. Choose the Yes button to create the revision and then choose the OK button to close the confirmation message.
4. Make changes to the Description, Starting Date, and Text fields as needed.
5. If needed, update the translations by choosing the Translations action.

See Also

Quality Assurance Setup

Feedback

Submit feedback for this page .

Lot/Serial No. Status

In the Lot-/Serial No. Status page, the Print Certificate checkbox must be selected for lot/serial number statuses that allow printing of Customer Certificates.

In the Customer Certificate page, there are two print options in the Print/Send menu:

- Test Print - Opens/prints a proforma version of the Customer Certificate even if the Print Certificate checkbox is not selected in the Lot-/Serial No. Status page.
- Print - Only opens/prints the Customer Certificate if the Print Certificate checkbox is selected in the Lot-/Serial No. Status page. If not selected, an error message opens.

See Also

Lot-/Serial No. Status
Print Customer Certificate

Feedback

Submit feedback for this page .

User Setup

In the User Setup page, the Certificate Signature checkbox must be selected for users that are authorized to sign Customer Certificates.

It is not possible to assign more than one user as signatory for certificates. By default, this user's ID will be assigned to the Signed by field in the Customer Certificate Card. The user's full name will be on the printed Customer Certificate.

> **Note**
> **This function provides no electronic signing of certificates.**

See Also

Customer Certificate Card

Feedback

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Inventory Conditions

Inventory conditions for providing information about long-term storage are maintained in the Inventory Conditions page. These storage conditions are used to inform stakeholders about storing practices with the intention that products should be stored in such a way as to avoid degradation.

Extended text in the Long-Term Storage Condition field is available for translation by choosing Inventory Condition > Translations in the Related menu on the Inventory Conditions page.

Inventory Conditions are assigned to items (Item Card > QA FastTab), which are transferred to the General FastTab of the Customer Certificate upon creation. These long-term storage conditions are printed on the certificate.

See Also

Customer Certificate Card

Feedback

Submit feedback for this page .

Certificate Report Selections

In the Report Selection - Certificate page, specify which default COSMO Quality Assurance report will be printed in case of a proforma printed document or certified certificate:

- Certificate Test (report ID 5034569)
- Certificate (report ID 5034568)

Either report can be sent as an email attachment.

See Also

Print Customer Certificate

Feedback

Submit feedback for this page .

Configuration

Configuring a Customer Certificate requires information from many different areas and depends on whether the certificate is general or customer-specific. Once master data and other setup is defined (see General Setup), you can begin the process of configuring the information that is used to create the test results, which are used to create the Customer Certificates.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up Customer Certificate information on Test Properties and Test Property Sets.	Test Property and Test Property Sets
Set up a Test Plan for Customer Certificate processing.	Test Plans
Assign test plans to item for Customer Certificate processing.	Test Plan Assignment

Feedback

Submit feedback for this page .

Test Property and Test Property Sets

Customer Certificate information is based on the test plan results. Test Plans are made up of test properties and test property sets. The fields on the Test Property and Test Property Sets are described in this section.

Test Property Card

Test Properties specify essential parameters to perform testing on one hand and to verify measurements with customer specifications in the other hand.

On the Test Property Card, there are several fields that relate to the Customer Certificate.

General FastTab

On the **General** FastTab, the **Test Method No.** field indicates how the test property should be tested. For more information, see Test Methods.

Customer Certificate FastTab

The fields in this FastTab refer to how the certificate should deal with the results or measurements for the test property. The fields are separated by whether the property meets the requirements between tolerances or expected values.

Field	Description	Meets Requirements
Type	Specifies if Actual Value (real measurements) or Reported Value (range of measurements) is used.	▯
Reported Value	Specifies if the value is accepted if *Reported Value* is selected as the **Type**.	▯
Out-Of-Spec. Type	Specifies what type of information should be listed in the Customer Certificate if the specification does not meet requirements. The options are *Text* and *Value*.	
Out-of-Spec. Text	Specifies the reason the specification does not meet requirements if *Text* is selected in the **Out-Of-Spec. Type** field.	

Field	Description	Meets Requirements
Calculation Type	Specifies the rule used to consolidate test results. The options are - *Min* - Specifies lowest value of all test results for a Test Property. - *Max* - Specifies highest value of all test results for a Test Property. - *Average* - Specifies value calculated as average of all test results for a Test Property. - *Standard Deviation* - Specifies value calculated as standard abbreviation of all test results for a Test Property. - *First Value* - Specifies first value recorded for a Test Property. - *Latest Value* - Specifies latest value recorded for a Test Property.	
No Print on Certificate	Determines if test properties are printed on certificates. By default, the test properties are included in the printed certificate; therefore, turning on this toggle will exclude the test properties from the printed certificate.	

Contextual Details FastTab

On the Contextual Details FastTab of the Test Property Card, the Test Property Short Text field provides a place to add extended text, which can be printed on the Customer Certificate. This text can be translated by choosing Property > Translations on the Related menu.

Test Property Sets

Test Property Sets are bundles of Test Properties. Therefore, the fields in the Test Property Card that relate to Customer Certificates are in the Lines FastTab of the Test Property Set Card.

When a Test Property is added to a Test Property Set, the information from these fields is copied to the line. Related test translations are copied to the Test Property Set line as well (accessed from the Lines FastTab by choosing Line > Translations).

On the Contextual Details FastTab of the Test Property Set Card, the Test Property Set Short Text field provides a place to add extended text, which can be printed on the Customer Certificate. This text can be translated by choosing Property Set >

Translations on the Related menu.

Feedback

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Test Plans

Test Plans are used as the basis for recording testing values in test orders and for recording a customer's specifications for customer certifications.

Once test properties and test property sets are defined with customer certificate information, the Test Plans can be created.

In the General FastTab, enter the overview information for the specification. In the Lines FastTab, enter the test property sets. In the Usage FastTab, enter the item information relating to the specifications.

Test Plan Prop. Set Card

The fields relating to the Customer Certificate from the Test Property Set are included in the Lines FastTab in the Test Plan Prop. Set Card. Also included are the test translations.

In the General FastTab, the Test Prop. Set Text field allows for extended text, which can be translated by choosing Property Set > Translations on the Related menu.

Values and Specifications

In the Lines FastTab, the Expected Value, Upper Limit, and Lower Limit fields are used with the Type, Reported Value, Out-Of-Spec. Type, and Out-of-Spec. Text fields for determining specification information on the Customer Certificate.

For example, if the Expected Value is *A* and the Type = *Actual Value*, then a value of *A* in testing meets the specification and this value will be shown on the Customer Certificate. If a testing value of either *B* or *C* is used, then the Out-of-Spec. text or value will be shown on the Customer Certificate.

Feedback

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Test Plan Assignment

The information required for creating Customer Certificates varies depending on if general or customer-specific certificates are needed:

- Items that require General Certificates must have at least two entries in the Test Plan Assignment page:
  - Source Type = document for creating the test orders, such as *Purchase Receipt* or *Production Order*, which is needed for creating the results used in the certificate.
  - Source Type = *Certificate* with lot and test plan information only
- Items that require Customer-Specific Certificates only need one entry in the Test Plan Assignment page:
  - Source Type = document for creating the test orders, such as *Purchase Receipt* or *Production Order*, which is needed for creating the results used in the certificate.
  - Source Type = *Sales Order* with customer, contact, language, lot and test plan information

The Test Plans assigned to each source type should use the concurring Test Properties to properly generate test result entries. Each Test Property used is consolidated to test results that can be used in Certificates. Test Properties that are added to a Customer Certificate line before certification can also use Test Results from previous testing.

> **Note**
> **Item Tracking must be activated to create a Customer Certificate.**

General Certificates

In the Test Plan Assignment page, set the Source Type to *Certificate*, and then enter the relevant Item No., Test Order Option for lot/serial number, and Test Plan No.

This setting does not result in testing; its purpose is to allow you to verify test results with the specifications of the test plan and to create a Customer Certificate document.

The certificate is not created for an individual customer and does not refer to a sales line (for instance, sales quote).

Customer-Specific Certificates

In the Test Plan Assignment page, set the Source Type to *Sales Order*, enter the relevant Item No., Contact No., Language Code, Test Order Option for lot/serial number, and Test

Plan No.

This setup allows you to assign an individual test plan to a sales line. For example, to add a customer's specification to a Sales Quote, you specify:

- the customer in the Source No. field.
- who will receive the certificate in the Contact No. field.
- in which language the certificate should be printed in the Language field.
- the specification itself in the test plan, which is linked in the Test Plan No. field.

As with the general certificate, this setting does not result in testing; its purpose is to allow you to verify test results with the specifications of the test plan and to create a Customer Certificate document.

Note

Setting up an entry with the *Sales Order* option still allows for the creation of test orders per sales line. This setting just allows the additional creation of the customer-specific certificate.

Feedback

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Processing

There are two ways to process a Customer Certificate:

- A general certificate corresponding to company specification and without individual customer requirements
- A certificate used for specific item/customer combination

The setup of the different methods is described in the Test Plan Assignment section. This section describes the steps to create the Customer Certificate, describes how test results are created/used, describes the Customer Certificate Card, and then describes how to print the Customer Certificate.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Learn the general steps for creating a Customer Certificate.	Create Customer Certificate
Learn how the test results are used in creating a Customer Certificate.	Test Results
Learn about the fields and actions in the Customer Certificate Card.	Customer Certificate Card
Learn how to add or delete lines from a generated Customer Certificate.	Customize Existing Customer Certificate
Print a Customer Certificate.	Print Customer Certificate

Feedback

Submit feedback for this page .

Create Customer Certificate

To create a Customer Certificate, you must configure Test Plan Assignment, assign a test plan to verify measurements, and record some measurements for a lot- or serial number. For instance, the process might include steps from setup to the actual creation. The steps below provide a general overview.

1. Set up test properties for measurements.
2. Assign test properties to test property sets.
3. Assign test property sets to test plans.
4. Set up test plan assignment to item:
   - Source Type = document to create test orders with test plan and all relevant testing settings
   - Source Type = Certificate or Sales Order
     - Certificate - with lot and test plan information only
     - Sales Order - with customer, contact, language, lot, and test plan information
5. Process document(s) to create test order(s).
6. Process test orders(s) and set to Finished.

   > **Note**
   > **Test Orders must have Status = *Finished* to add the values to the Test Results Consolidated page.**

7. If not done automatically, set the Lot-/Serial No. Status to a valid status that allows Customer Certificate printing.

For general certificates:

1. To review the test results before creating the Customer Certificate, open the Lot No. Information or Serial No. Information page.
   - Choose the Testing History action to review the posted test results for the item/lot- or serial number combination.
   - On the Related menu, choose the Test Results action to view the Test Results Consolidated with calculated and text values based on test calculation types.
2. To create the Customer Certificate, choose the Create Certificates action.

For customer-specific certificates:

1. As needed, review the test results as described above before creating the Customer-Specific Certificate.

2. Create the sales document and on the Lines FastTab, choose Quality Assurance > Order-Specific Test Plan on the Line menu to create a test plan for the sales line.
3. In the Test Plan Assignment page, choose the Copy Test Plan action and then choose the Customize Test Plan action to update the new test plan with specifications from the customer.
4. Close the Test Plan Assignment page.
5. On the Lines FastTab, choose Quality Assurance > Create Customer Certificate action on the Line menu.

See Also

Configuration
Lot-/Serial No. Status

Feedback

Submit feedback for this page .

Test Results

After processing test orders, the test results are transferred to the Test History. When the test orders are finished, the results are transferred to the Test Results Consolidated page, which combines all test results from multiple test orders for an item tracked lot- or serial number and then uses this information as the basis for the Customer Certificate.

You can access both test history and consolidated test results from the Lot No. Information or Serial No. Information pages, filtered by the specific lot/serial number, or you can open the pages separately using Tell Me.

Lot No. / Serial No. Information Pages

To open test results from the test orders posted for the selected item/lot- or serial number combination, choose the Testing History action on the Lot No. / Serial No. Information page. For more information, see Testing History.

To open the consolidated test results based on the Customer Certificate parameters in the test plans, choose the Test Results on the Related menu.

In addition to accessing test results, you can create or open Customer Certifications from the Lot No. Information Card or Serial No. Information Card.

Test Results Consolidated

The Test Results Consolidated page lists information for the following data types:

- Decimal
- Integer
- Boolean
- Options

The calculation of each based on the related result fields are described in the following table.

Data Type	Calculation Type	Calculated Value	Boolean Value	Value as Text
Integer / Decimal	Min	Lowest value of all Test Results.		

Data Type	Calculation Type	Calculated Value	Boolean Value	Value as Text
	Max	Highest value of all Test Results.		
	Average	Sum of all Determined Values / No. of Values.		
	Standard Deviation	Average distance of all values calculated from the *Average*; adds the latest value to the existing result.		
	First Value	First Determined Value, based on the sorting setup.		
	Latest Value	Last Determined Value, based on the sorting setup.		
Boolean	Min		First value or "false" if any other value is "false".	
	Max		First value or "true" if any other value is "true".	
	Average		"True" if at least half of the values are "true", otherwise "false".	
	First Value		First Determined Value, based on the sorting setup.	

Data Type	Calculation Type	Calculated Value	Boolean Value	Value as Text
	Latest Value		Last Determined Value, based on the sorting setup.	
Option	Average			Contains the Expected Value if at least half of the Determined Values = Expected Value. Otherwise, contains the Out-of-Spec Value value.
	First Value			First Determined Value, based on the sorting setup.
	Latest Value			Last Determined Value, based on the sorting setup.

The Test Order Output Value field shows the output value of a unique test property (i.e., not using multiple measurements) that was specified during value recording for the test order for all calculation types except *Average* and *Standard Deviation*. This value will be transferred to the Customer Certificate line and shown in the Customer Certificate reports.

The following sections describe special situations for the calculation types described above.

Standard Deviation

The *Standard Deviation* option for *Integer / Decimal* types is a statistical measurement that measures the dispersion of a Testing History relative to its mean and is calculated as the square root of the variance. Expected Value or Upper/Lower Limit of Test Plan Test Property refers to this Calculation Type. Depending on the calculated standard deviation of the Consolidated Test Result verified by limits/expected value, the line details of the Certificate use the information of acceptance or out-of-specification. Therefore, the statistical measurement is used to check if the Consolidated Test Result meets the specification (Test Plan Test Property).

First and Latest Values

The *First Value* and *Latest Value* options are based on the first and last recorded *and* finished values, sorted by Test Order No., Test Order Property Set Line No., and Test Order Property Line No. in order of creation of the Test Orders.

This means that the Document No. of the Finished Test Orders is used as the basis: If the Document No. of the Test Order to be finished is smaller than the "First" or greater than the "Latest", then it is used in the Test Results Consolidated page.

For example, ten test orders are created for LOT0021. Values are recorded for all test orders but only TO00048 and TO00052 are finished. The results of these two orders are transferred to the Test Results Consolidated page for *Integer / Decimal* types and used as the first and latest values:

Test Order No.	Values Recorded	Finished / Test Results Consolidated	First / Latest Result
TO00046	▯		
TO00047	▯		
TO00048	▯	*▯*	First
TO00049	▯		
TO00050	▯		
TO00051	▯		
TO00052	▯	*▯*	Latest
TO00053	▯		
TO00054	▯		
TO00055	▯		

Then test orders TO00047 and TO00054 are finished. The results show that the First and Latest entries change based on the order of the finished test orders:

Test Order No.	Values Recorded	Finished / Test Results Consolidated	First / Latest Result
TO00046	▯		
TO00047	▯	*▯*	First
TO00048	▯	▯	
TO00049	▯		
TO00050	▯		
TO00051	▯		

Test Order No.	Values Recorded	Finished / Test Results Consolidated	First / Latest Result
TO000052	▯	▯	
TO000053	▯		
TO000054	▯	*▯*	Latest
TO000055	▯		

Later, test order TO000051 is finished. The results remain the same:

Test Order No.	Values Recorded	Finished / Test Results Consolidated	First / Latest Result
TO000046	▯		
TO000047	▯	▯	First
TO000048	▯	▯	
TO000049	▯		
TO000050	▯		
TO000051	▯	*▯*	
TO000052	▯	▯	
TO000053	▯		
TO000054	▯	▯	Latest
TO000055	▯		

This result occurs because even though TO000051 was the most *recently* finished recorded value, TO000054 is still the *last* finished recorded value. Since values are transferred to the Test Results Consolidated page when test orders are *Finished*, this ensures that the last recorded value is used instead of an older test value that was recently finished.

Note

In a live environment, test orders would not be randomly finished as shown in the example; it was merely done to explain the functionality.

Min/Max

The *Min* and *Max* options for the Boolean data type show the deviation from the expected value.

- For the *Min* option, the Boolean Value field will show the first recorded value (either *Yes* or *No*) or will automatically show *No* if any other value is "false".
- For the *Max* option, the Boolean Value field will show the first recorded value (either *Yes* or *No*) or will automatically show *Yes* if any other value is "true".

Average

The *Average* option for the Boolean and Option data types bases the results on whether at least half of the values match the expected results.

- For the Boolean data type, the Boolean Value field will be *Yes* if at least half of the values are "true", otherwise the field will be *No*.
- For the Option data type, the Value as Text field contains the expected value if at least half of the Determined Values match the Expected Value. If not, the field contains the value from the Out-of-Spec Value field, which is specified for results that do not match the expected value.

Feedback

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Customer Certificate Card

The Customer Certificate Card combines all the information from the test properties and test property sets in the Test Plan (assigned to Test Plan Assignment with Source Type = *Certificate* or *Sales Order*) as well as test results to be used in the creation of the Customer Certificate. It contains a line for every test property from the assigned Test Plan and can provide additional values and decisions from existing test results.

The Customer Certificate Card is accessed from:

- Tell Me by choosing the 🔍 icon, entering Customer Certificates, and then choosing the related link.
- the Role Center by choosing Navigate > Customer Certificates.
- Lot No. Information Card/Serial No. Information Card by choosing the Create Certificates action or the Certificates action on the Related menu.
- Sales Quote, Sales Order, or Sales Invoice by selecting the relevant line and then choosing Line > Quality Assurance > Create Customer Certificate or Open Customer Certificate on the Lines FastTab.

General FastTab

The fields on the General FastTab are described in the following table.

Field	Description
No.	Specifies the unique identifier of the customer certificate.
Version	Specifies the version of the customer certificate. A new version is created each time a customer certificate is created for the item/test plan combination.
Status	Indicates the current status of the customer certificate. The options are *New*, *Under Development*, *Certified*, *Archived*, and *Canceled*. Only a certified customer certificate can be printed during sales order or shipment processing.
Certification Date	Indicates the date when the customer certificate was certified.
Language Code	Identifies the specific language to be used for the customer certificate, based on the language specified in the Test Plan Assignment. This must be set to print the certificate in a different language.

Field	Description
Item No.	Indicates the item the customer certificate relates to, specifically in relation to the lot/serial number information in the Item Tracking FastTab.
Description	Specifies a short description of the customer certificate.
Description 2	Specifies an additional description of the customer certificate.
Variant Code	Indicates the item variant the customer certificate relates to, specifically in relation to the lot/serial number information in the Item Tracking FastTab.
Signed by	Indicates the User ID of the authorized signer specified in User Setup. For more information, see User Setup.
Customizable	Indicates whether the Customer Certificate can be changed. This toggle is automatically turned on when a new version of the Customer Certificate is created; it cannot be changed manually. For more information, see Customize Existing Customer Certificate.
Long-Term Storage Condition Code	Specifies the inventory condition transferred from the Item Card, which is used to inform the customer of the best way of storing the item for long-term usage.
No. Printed	Indicates the number of times the Customer Certificate has been printed, either from this page or the sales quote/order/shipment. Printings via Test Print are not counted.
Modified by	Identifies the user ID of the last person to modify the customer certificate.
Modified At	Indicates the date and time the customer certificate was last modified.
Created by	Identifies the user ID of the person who created the customer certificate.
Created At	Indicates the date and time the customer certificate was created.

Lines FastTab

The fields on the Lines FastTab are described in the following table.

Field	Description
Test Property Set Code	Specifies the test property set code for the specification.

Field	Description
Test Property Set Text	Indicates the text from the test **Test Prop. Set Text** field in the test plan line.
Test Property Code	Indicates the test property code from the test property set line.
Test Property Description	Indicates the description of the test property code from the test property set line.
Output Value	Indicates the information that will be printed on the Customer Certificate based on the test results of the selected Result Type Code. For example, *Confirmed* would indicate a positive result meaning that all values are as expected or between the tolerances (upper/lower limit).
Unit of Measure	Indicates the unit of measure, if the measured or calculated value is used as output.
Result Type Code	Indicates the result type used as the specification to test. For more information, see Test Results.
Comment	Indicates whether a comment exists for the test property set.
Test Method No.	Indicates the test method used for testing the test property set.
Method Revision	Indicates the test method revision number used for testing the test property set.
Method Text	Indicates the test method extended text used for testing the test property set.
Calculation Type	Indicates the calculation type from the test property/test property set.
No Print on Certificate	Indicates the **No Print on Certificate** setting from the test property/test property set/test plan.
Test Order Output Value	Indicates the value entered in the **Output Value** field for a unique test property in the value recording process (i.e., not using multiple measurements). *NOTE: This field is empty for test results with* ***Test Calculation Types*** *=* Average *and* Standard Deviation.

Field	Description
Test Property Text	Indicates the text from the Test Property Text field in the Test Plan Prop. Set Card line.
Test Property Text 2	Indicates the text from the Test Property Text 2 field in the Test Plan Prop. Set Card line.
Testing Method	Indicates the testing method from the test property/test property set/test plan.

On the Line menu, you can open Test Values (results) and Comments on the Line menu, as well as Method Translations, Property Set Translations for the selected test property set line, and Property Translations on the Translations menu.

You also have the ability to add or delete lines on the Manage menu. If adding a line to a generated customer certificate (i.e., one that was not created manually), an editable version of the certificate will be created (see Customize Existing Customer Certificates).

Customer FastTab

The fields on the Customer FastTab are described in the following table.

Field	Description
Document Type	Indicates the document used to create/print the customer certificate.
Document No.	Indicates the number of the document used to create/print the customer certificate.
Sell-to Customer No. .. Sell-to Country/Region Code	Indicates sell-to customer and address information.
Send-to Contact / Send-to Contact No.	Indicates the number and name of the contact the customer certificate was sent to, as indicated on the contact in the Test Plan Assignment.

Item Tracking FastTab

The fields on the Item Tracking FastTab are described in the following table.

Field	Description
Lot No.	Indicates the lot number if lot tracking is used.

Field	Description
Serial No.	Indicates the serial number if serial number tracking is used.
Expiration Date	Indicates the expiration date of the lot/serial number.
Entry Date	Indicates the date the lot/serial number was entered in item tracking.

Test Plan FastTab

The fields on the Test Plan FastTab are described in the following table.

Field	Description
Source Type	Indicates which test plan source type was used to create the customer certificate.
Test Plan No.	Indicates the number of the test plan that was used to create the customer certificate.
Test Plan Version	Indicates the version number of the test plan that was used to create the customer certificate.

Actions

The actions on the Customer Certificate Card page are described in the following table.

Menu	Action	Description
Home	Sales Document	Opens the sales document related to the Customer Certificate if created from a sales document. This action is also on the Related menu.
Print/Send		The actions on this menu are standard print/send actions. The number of times the certificate is printed is stored in the No. Printed field on the General FastTab. These actions are also on the Related menu. For more information, see Print Customer Certificate.
Related > Shipment	Warehouse Shipment Lines	Opens the Whse. Shipment Lines page to view ongoing warehouse shipments for the customer certificate, in advanced warehouse configurations.
Related > Item Tracking	Lot No. Information	Opens the Lot No. Information Card page with lot information if the customer certificate is based on lot tracking. For more information, see Information Card.

Menu	Action	Description
	Serial No. Information	Opens the Serial No. Information Card page with serial number information if the customer certificate is based on serialized item tracking. For more information, see Information Card.
	Item Tracing	Opens the Item Tracing page filtered on the serial number/lot number/item/variant that the customer certificate is based on. For more information, see Item Tracing.
Related > Test Order	Test History	Opens the Testing History page filtered by date/item/variant/lot/serial number with testing results for the related test orders that the customer certificate is based on. For more information, see Testing History.
Related > Inventory	Inventory Overview	Opens the Inventory Overview page filtered on the item number/lot number/serial number/variant that the customer certificate is based on. For more information, see Inventory Overview.
Related > Certificate	Comments	Opens the Quality Assurance Comments page, where you can enter comments that will be printed on the Customer Certificate. Translations are possible by entering a language in the Language Code field.

See Also

Quality Assurance Setup

Feedback

Submit feedback for this page .

Customize Existing Customer Certificates

If information in the generated Customer Certificate needs to be changed, you can use the **New Line** or **Delete Line** actions on the **Manage** menu in the **Lines** FastTab.

Insert Line

When you choose the **Insert Line** action (or go to an empty line), a message opens asking if you want to create a new version. If you choose the **No** button, no version is created and no line is added. If you choose the **Yes** button, the original certificate is archived and a new certificate version is created. A message opens asking if you want to open the new certificate. In the new customer certificate, the **Status** is set to *New* and the **Customizable** toggle is turned on in the **General** FastTab to indicate that changes can be made.

Ensure that the Customer Certificate is certified once all changes are made.

Delete Line

When you choose the **Delete Line** action, a message opens asking if you want to delete the line. If you choose the **Yes** button, then the line is deleted; no new version is created.

Feedback

Submit feedback for this page.

Print Customer Certificate

You can print a test version or actual Customer Certificate using the actions on the Print/Send menu. Depending on the type of document that needs to be printed, there is a requirement and result of printing.

> **Note**
> **Ensure that Customer Certificate and Test Report report IDs are defined (see Certificate Report Selections).**
> **Additionally, test properties are printed on either report as long as the No Print on Certificate field is not activated in related test property pages (see Test Property and Test Property Sets).**

Customer Certificate

The Print action opens the Customer Certificate for preview but will only allow printing if the Lot-/Serial No. Status permits it (see Lot/Serial No. Status). Printing a Customer Certificate will increase the value in the No. Printed field on the General FastTab.

Test Report

The Test Report action opens/prints a proforma version of the Customer Certificate, which allows you to view and check the printed document before certification/approval.

This report does not require a Lot-/Serial No. Status with printing permissions and does not increase the number of printed Customer Certificates if printed.

Extended Text

Extended text from the test property, test property set, test plan, and test method are shown in the lines of both reports. Text can originate from the test property but be changed on the various documents, but in general, the text is displayed as follows:

- The text in the Test Prop. Set Text field from the Test Plan Card line is transferred to the Test Property Set Text field on the Customer Certificate line. This text is bolded and is used as a header for the test property set.
- The text in the Test Property Text field from the Test Plan Prop. Set Card line is transferred to the Test Property Text field on the Customer Certificate line. This text is shown as the test property description.

- The text in the **Test Property Text 2** field from the Test Plan Prop. Set Card line is transferred to the **Test Property Text 2** field on the Customer Certificate line. This text is shown next to the test property description.
- The text in the **Text** field from the Method Card is transferred to the **Method Text** field on the Customer Certificate line. This text is shown at the end of the report lines, under the Specification column.

This text can be translated and shown in the language defined in the **Language Code** field on the Customer Certificate Card. For more information, see Test Translations.

Feedback

Submit feedback for this page .

Inventory

COSMO Quality Assurance includes the following pages that provide quality assurance information about inventory:

- Inventory Overview
- Inventory List
- Item Tracing

Each page is accessed using Tell Me. Choose the icon, enter the page name, and then choose the related link.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Learn about the information in the Inventory Overview page.	Inventory Overview
Learn about the information in the Inventory List page.	Inventory List
Learn how to use and find out which special COSMO Quality Assurance fields are in the Item Tracing page.	Item Tracing

Feedback

Submit feedback for this page .

Inventory Overview

The Inventory Overview page combines information from the Item Ledger Entries and the Warehouse Entries.

This inventory overview is indispensable, especially for companies who use the standard Warehouse module of Microsoft Dynamics 365 Business Central and therefore must be able to see their inventories on the warehouse level.

The fields on the Inventory Overview page are described in the following table.

Field	Description
Item No. / Item Description	Number and description of the respective item.
Location Code	Location code of the item / lot / serial number.
Bin Code	Bin code of the item / lot / serial number.
Lot No.	Lot number of the item.
Quantity	Quantity of the item / lot / serial number (not the Available Quantity) in the posted or base unit of measure, depending on the setting in the Inventory Overview Display field on the Quality Assurance Setup page (see Quality Assurance Setup).
Qty. Picked	Picked lots are displayed. Choose the field to open the Warehouse Entries page to view related entries.
Status (Lot/SN)	Status of the lot / serial number.
Entry Date	Entry date of the lot / serial number.
Expiration Date	Expiration date of the lot / serial number.
Variant Code	Variant code of the item.
External Lot No.	External lot number of the vendor.
Item Category Code	Default field for the item category code.
Serial No.	Default field for the serial number.

Field	Description
Warranty Date	Warranty date of the lot / serial number.
Retest Date	Date of the next quality assurance testing of the lot / serial number.
Quarantine Date	Quarantine date of the lot / serial number.
Availability Date	Availability date of the lot / serial number.
Global Dimension 1 / Global Dimension 2	Specifies the global dimensions that are linked to the record or entry for analysis purposes.
Quantity (Base)	Quantity of the item / lot / serial number (not the Available Quantity) in the base unit of measure of the Item Card.
Unit of Measure Code	Based on the setting in the Inventory Overview Display field in the Quality Assurance Setup page of whether the Quantity is displayed in the current unit of measure or the Base Unit of Measure from the Item Card.

Tip

The Inventory Overview page can also be accessed by choosing the Inventory (IO) field on the Inventory List page (see Inventory List), by choosing Line > Quality Assurance > Open Inventory Overview on the Lines FastTab of the Sales Quote, Sales Order, Sales Invoice, and Transfer Order pages, by choosing Related > Inventory > Inventory Overview on the Customer Certificate Card (see Customer Certificate Card), and by choosing Home > Inventory Overview on the Planning Worksheets page. This way, the inventory overview is filtered on the respective item.

Quick Change Status

The QA Status of a lot- or serial number can be changed from the Inventory Overview page by choosing the Change Status action on the Home menu.

A simplified version of the Lot-/Serial No. Administration page opens with only the selected lot- or serial number line, the Post and Information Card actions, and a FactBox with lot- or serial number details.

Only the Quantity and New Status (Lot/SN) fields are editable. Unlike the Lot-/Serial No. Administration page, you do not need to enter a quantity unless you are posting a different quantity to the new status. Otherwise, you only need to enter the new status and then choose the Post action. You can enter comments during this process if comments are enabled (based on the setting in the Skip comments update on Status posting field in the Quality Assurance Setup page). The results are the same as when posting in the standard Lot-/Serial No. Administration page.

View Lot-/Serial No. Administration

On the Home menu, choose the Lot-/Serial No. Administration action to open the standard version of the Lot-/Serial No. Administration page filtered on the selected Inventory Overview line. An error message will open if no item tracking is used or set up for the line. For more information, see Lot-/Serial No. Administration.

View Testing History

On the Home menu, choose the Testing History action to open the Testing History page, which shows test results for test orders filtered by date, item, item and variant, lot or serial number. The page is opened filtered on the specific item, item/variant, lot number or serial number selected in the Inventory Overview page. For more information, see Testing History.

View Item Ledger Entries and Warehouse Entries

On the Home menu, choose the Item Ledger Entries or Warehouse Entries action to view the relevant entries for the selected lot- or serial number.

Retest Order Creation from Inventory Overview

Retest Orders can be created from the Inventory Overview for items that have lot-/serial numbers with inventory and a Source Type = *Inventory* in the Test Plan Assignment page. On the Retest menu, choose Create Retest Orders for the selected items.

When creating a Retest Order from the Inventory Overview, the date filter for the Default Retest Go-Ahead Rate (in the Quality Assurance Setup page) is not considered. This ensures that the retest order can be created from the Inventory Overview if a date field is not specified.

For more information about Retest Orders, see Retest Orders.

View Dimensions

On the Retest menu, choose the Dimension action to open the filtered Dimension Set Entries page, where you can view dimensions for the selected line. Use the Set Dimension Filter action to open the Dimension Filter page, where you can filter the inventory overview lines to the specified filtered dimensions.

Compare Test Results

The same Compare Test Result function that is available from a Test Order is also available in the Inventory Overview. The results are checked using the Test Plan Assignments for Source Type = *Sales Order* or *Order-specific* and the result is shown in the same matrix view as when opened from the Test Order (see Test Order Comparison).

In the Inventory Overview page, select the item to check. On the Actions menu, choose Compare > Compare Test Results. The Test Order Selection page opens.

In the Test Order Selection page, choose the test order for which to view the test results and then choose the OK button. The Test Order Properties Compare page opens with the test results for the selected test order.

Feedback

Submit feedback for this page .

Inventory List

The Inventory List page displays the inventory per item (production and filling items respectively). The items in this page can be filtered by Location and Bin.

The list contains information about the:

- Entire available Inventory
- Quantity on Sales Orders, Purchase Orders, Production Orders, and Component Lines

In addition, the Inventory List page displays information about the usage of the item within the last:

- Month
- 3 Months
- 6 Months
- 12 Months

By choosing the Inventory (IO) field on a line, users can access the Inventory Overview page, which will be filtered on the respective item.

Feedback

Submit feedback for this page .

Item Tracing

In the Item Tracing page, it is possible to display individual lot- or serial numbers (with certain filter criteria in the header). The direction of the tracking (Origin -> Usage or Usage -> Origin) can also be defined in the Trace Method field.

Tracking is performed on a multi-level basis across all levels from purchase to sales and not only show goods movements (purchase entries, consumption postings, sales entries, and so on) but modifications on lot- or serial numbers as well (for example, changes to lot status, changes in the expiration date, and so on).

On the Lines FastTab, select a line and then choose Line > Show Document to open the document on which the item in the respective line is based.

In the Item Tracing page, the following lot- and serial number data modifications are shown:

- Serial No.
- Lot No.
- External Lot No.
- Status (Lot/SN)
- Quarantine Date
- Retest Date
- Warranty Date
- Entry Date
- Availability Date
- Expiration Date

Refer to the Microsoft Dynamics 365 Business Central Help for other standard material movements in the Item Tracing page.

Feedback

Submit feedback for this page .

Retest Orders

Based on several parameters and filters, the Create Retest Order function allows you to select a set of Lots- and/or Serial Nos. in a range of Retest Dates for which Retest Orders will be created.

Test Orders will only be created for Lots- and Serial Nos. with inventory, and items must have a Source Type = *Inventory* in the Test Plan Assignment page.

Setup

In the Quality Assurance Setup page, the date formula entered in the Default Retest Go-Ahead Rate field uses the system date to create a range of dates for which the retest orders should be dated.

For example, if the system date is February 10, 2021, and *100D* is entered in the Default Retest Go-Ahead Rate field, then the Retest Date field in the Create Retest Order batch job will be set to *02/10/21..05/21/21*.

To create retest orders

Ensure that the lot has a Retest Date that falls within the date range defined in the Default Retest Go-Ahead Rate field in the Quality Assurance Setup page.

1. Choose the icon, enter Create Retest Order, and then choose the related link.
2. In the Options FastTab, turn on the Preview toggle to automatically open the Lot/Serial No. List page to see the lots that meet the criteria. In the Lot/Serial No. Information FastTab, the Retest Date is set based on the date formula in the Quality Assurance Setup page. Additional filters can be set to narrow the number of retest orders to be created.
3. Choose the OK button to run the function. If the Preview toggle was turned on, then the Lot-/Serial No. List page opens with the lot to be created with Retest Order.

Important

Turning on the Preview toggle in the Create Retest Order batch job only opens the Lot-/Serial No. List page, it does not create the retest orders. Therefore, the Create Retest Order function must be run again with the Preview toggle turned off to complete the process.

4. Close the Lot-/Serial No. List page.
5. Reopen the Create Retest Orders function and confirm the settings in the Lot/Serial No. Information FastTab. Ensure that the Preview toggle is turned off and then choose the OK button. A message will open with the number of incidents created.
6. Choose the icon, enter Test Incidents, and then choose the related link to view the incidents for the retest orders.

The test incident is related to the new retest order, per lot, and can be processed as usual.

See Also

Retest Order Creation from Inventory Overview

Feedback

Submit feedback for this page .

Stability Tests

With Stability Tests it is possible to determine how a lot will behave under various inventory conditions like temperature, brightness, or humidity during a certain period. In this case, it is possible to create a stability test, which is the basis for testing lots in calculated intervals.

The tests are carried out based on defined test plans. All collected test results of the particular features can be printed.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up the Inventory Conditions and Stability Test Schedules needed to use Stability Tests.	Stability Test Setup
Learn about the Stability Test Card.	Stability Test Card
Learn how to use the Create Schedule function to automatically create the Stability Test Schedule.	Create Schedule
Learn how to create and complete a Test Order for a Stability Test.	Process a Test Order for a Stability Test
Learn how to cancel a Stability Test.	Cancel a Stability Test
Learn about the three Stability Test reports.	Stability Test Reports

Feedback

Submit feedback for this page .

Setup

The setup pages used with Stability Tests are accessed using Tell Me. Choose the icon, enter the page name, and then choose the related link.

Inventory Conditions

Inventory Conditions are different conditions like temperature, brightness, or humidity for carrying out stability studies. Each inventory condition is marked with a unique code and a significant description for the condition.

Stability Test Schedules

Stability Test Schedules define a default set of date formulas that can be automatically assigned to stability test lines. Select a line and then choose the Edit or View action on the Manage menu to open an existing schedule or choose the New action to insert a new schedule.

Feedback

Submit feedback for this page .

Stability Test Card

Stability Tests are created in the Stability Test Card, accessed using Tell Me. Choose the icon, enter Stability Tests, and then choose the related link.

General FastTab

The fields on the General FastTab are described in the following table.

Field	Description
No. / Description	Unique number and brief description of the stability test.
Inventory Condition Code	Inventory condition that is valid for this stability test.
Status	Current status of the stability test. The options are *New*, *Certified*, *In Process*, *Cancelled*, and *Finished*. New stability tests always start with the *New* status.
Test Schedule Code	Indicates the test schedule that should be used to automatically create the Stability Test lines.
Default Test Plan No.	Indicates the test plan that should be inserted to each Stability Test line when the Create Schedule function is run. *NOTE: The Test Plan No. can be changed per Stability Line.*
Default Test Plan Version	Indicates the test plan version that should be inserted to each Stability Test line when the Create Schedule function is run.
Item No. / Variant Code / Lot No. / Serial No.	Item and related tracking information for this stability test.
Test Order No.	If a Test Order is created from the Create Stability Test report, the appropriate Test Order number is automatically entered in this field. This number cannot be changed manually. If a separate Test Order is created for a line, the Test Order number can be different here.
Starting Date	Starting date for the stability test. *NOTE: Do not set this date earlier than the current work date.*

Lines FastTab

The fields on the Lines FastTab that must be completed to be able to run planning are described in the following table.

Field	Description
Test Plan No.	Indicates the Test Plan that must be used for the testing. When this time is reached, all test property sets of this test plan are copied into the test order. Exception: Separate Test Orders.
Test Plan Version	Indicates the Test Plan Version to be used for this stability test. The version status must be *Certified*.
Separate Test Order	Determines if this testing must be done in a separate test order. *NOTE: It is not possible to set the first line as a separate test order.*
Date Formula	Indicates the date formula for the testing interval. The entered date formulas are added to the testing date of the first Test Order. The first line identifies the tests at the testing date and is marked with the date formula "0D". All further intervals can be entered in the regular dates (such as 3M, 1Y, and so on).

Once all setup is complete, change the **Status** field to *Certified*. The **Test Date** field in the lines is updated based on the **Date Formula** and the **Starting Date** in the header.

To change a certified Stability Test, change the **Status** to *In Process*. All lines that are not yet scheduled can be changed. It is only possible to change the header information if none of the lines have been scheduled.

See Also

Create Schedule

Feedback

Submit feedback for this page .

Create Schedule

When the Create Schedule function is run, the Lines FastTab is populated with Date Formulas from the Stability Test Schedule and the Test Plan No. and Test Plan Version from the General FastTab are inserted on each line.

To create the stability test schedule

1. Choose the icon, enter Stability Tests, and then choose the related link.
2. Open the Stability Test Card page where a schedule needs to be created.
3. On the Home menu, choose the Create Schedule action to automatically create the:
   - required Stability Test lines based on the Stability Test Schedule defined in the Test Schedule Code field.
   - values in the Default Test Plan No. and Default Test Plan Version fields on the Stability Test Card.

See Also

Stability Test Schedules

Feedback

Submit feedback for this page .

Process a Test Order for a Stability Test

Once the setup of the Stability Card is complete, the initial Test Order for the stability tests must be created using the Create Stability Test function. After the test order is created and processed, additional tests are done based on the testing intervals until finished.

Run the Create Stability Test function

1. The Create Stability Test function can be run from the:
   - Stability Test Card by choosing the Create Stability Test action on the Home menu
   - Tell Me by entering Create Stability Test, and then choosing the related link

   > **Note**
   > **Define the user(s) who are authorized to run this function in the QA Permissions page (see QA Permissions).**

2. On the Options FastTab, define the time frame and determine whether the process should stop creating/refreshing test orders if an error occurs or not.
3. On the Stability Test Header FastTab, set a filter on the stability test(s) for which to create test orders.
4. Choose the OK button to run the function; a confirmation message opens.

> **Note**
> **This function should be added to the object waiting queue and automatically run daily. Hereby it must be filtered for the current date.**

If a Stability Test's starting date is within the stated time frame and no test order exists yet, an initial test order for the stability test is created. The Stability Test Card page is updated with the test order information. The test order number is displayed in the header and lines, and the Scheduled checkbox is selected in the first line, which means that tests have been issued.

Stability testing in the Test Order

The Test Property Set and Test Properties of the assigned Test Plan are copied into the generated Test Order.

On the Test Order, the Status is set to *Created* and the Stability Test Status is set to *On Hold*. The Test Destination Type, Test Destination No., and Test Destination Variant Code fields contain the originating data from the stability test and the Test Date field is set to the same date as the Starting Date on the stability test.

The fields on the Test Plan Source FastTab relate to the information entered on the stability test, such as the stability test number and line number reference; item tracking; and creation/modified user and dates.

The Stability Test Status field changes to *In Process* when the Test Order is released.

After completing the Value Recording process, the Status field:

- reverts to *Created* if the Inspection Result field is set to *Items are OK*.
- remains as *Value Recording* if the Inspection Result field is set to *Items are not OK*, which allows you to cancel the test order and stability test if necessary.

Regardless of the inspection result, the Stability Test Status reverts to *On Hold* if the Stability Test is designed to have further tests.

The corresponding line on the Stability Test Card will be updated as follows:

- Tested checkbox is selected
- Test Result field is set to *OK* or *Not OK*

Completing a Test Order for a Stability Test

Choose the Create Stability Test action to create existing Test Orders with further stability tests or generate separate test orders. The lines of the Stability Test are searched based on the Test Date and then the Test Orders are created with the Test Property Sets and Test Properties, based on the respectively assigned Test Plan Version.

If the function finds a Stability Test Order line with the Separate Test Order checkbox selected, a new Test Order is created and then the Scheduled checkbox is selected on all processed lines.

When a Test Order is finished, the test order Status and the Stability Test Status are hereby set to *Finished*.

Feedback

Submit feedback for this page .

Cancel a Stability Test

If a test result lies outside of the specification, the Stability Test can be cancelled manually using the Cancel function on the test order. With this function, it is possible to cancel only the test order or both test order and stability test.

If the Create Stability Test function is run afterward, no new test orders are generated for the cancelled stability tests. The cancellation of a separate test order has no consequences for the status of the stability test.

Cancelling Only a Test Order

When only the Test Order is cancelled (Yes to cancel the Test Order, No to cancel the Stability Test), a message opens that the Stability Test is still active and after choosing the OK button, the Status and Stability Test Status fields are set to *Cancelled* on the Test Order.

The Test Order No. is removed from the General FastTab of the Stability Test Card and only the corresponding test line(s) are cancelled, thus allowing the user to proceed with the Stability Test on the next line.

Cancelling a Test Order and Stability Test

When both the Test Order and Stability Test are cancelled, (Yes to cancel the Test Order, Yes to cancel the Stability Test), the Status and Stability Test Status fields are set to *Cancelled* on the Test Order. On the Stability Test Card, the Status is set to *Cancelled* and the corresponding test line(s) are cancelled.

Feedback

Submit feedback for this page .

Stability Test Reports

Reports for Stability Tests are generated from the Stability Test Card and the Test Order.

Stability Test Report

The Stability Test report can be printed by choosing Reports > Stability Test on the Stability Test Card page. This report shows the course of the stability tests per test property.

The measuring test property displays a list of the determined results as well as a graphic display of the course. The counting test property only displays a list of the determined results.

Note

The graphic can be shown only for test properties with a result of Type = *Decimal* or *Integer*.

Stability Test Planning Report

The Stability Test Planning report displays an overview of all test orders that are to be generated via a stability test within a specified time frame.

Access this report from the action bar of the Stability Test page or using Tell Me. Choose the icon, enter Stability Test Planning, and then choose the related link.

In the request page, set filters for a certain stability test as well as enter a date range, for which the analysis should be run.

Afterwards COSMO Quality Assurance determines all test orders, according to planning, that are supposed to be created within the specified time frame. The results are sorted by date.

Test Order Report

On the Test Order page, choose the Test Order action on the Reports menu to open the Test Order request page for printing the report.

To only print the test order for the current test – meaning the first test in the Test Order that has not been tested – a filter for the test order must be set on the Test Order FastTab.

On the Options FastTab, select the language and indicate whether to show actual values.

Feedback

Submit feedback for this page .

Nonconformity

In COSMO Quality Assurance, 8D Reports and Recalls are used to manage non-conformities. With 8D reports, problems with products, with or without specific lot-/serial numbers, can be registered and assigned to team members who will be responsible for addressing the issues. With recalls, products that have failed in some point of testing can be identified directly to the source and then letters can be sent to customers if the failure warrants a product return.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up and process 8D Reports.	8D Reports
Set up and process Recalls.	Recalls

Feedback

Submit feedback for this page .

8D Reports

The 8D Reports are used for registering problems or nonconformities in COSMO Quality Assurance. The report uses the eight steps of the Eight Disciplines (8D) Problem Solving and can be used to establish the schedule, add responsibilities, and note the effective dates.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up 8D Templates that are the basis for the 8D Reports.	8D Reports
Create an 8D Report.	Create 8D Reports
Print an open 8D Report.	Print 8D Reports
Close and print a Closed 8D Report.	Closed 8D Reports

Feedback

Submit feedback for this page .

8D Templates

The 8D Templates are used as the basis for the 8D Report.

Once the number series are defined and assigned in the Quality Assurance Setup page, an 8D Template can be created.

To create 8D Templates

1. Choose the icon, enter 8D Templates, and then choose the related link.
2. In the 8D Templates page, choose the Edit or View action to open an existing template or the New action to create a new template.

   The 8D Template Card contains eight FastTabs, where seven of the eight disciplines for problem solving/resolution are defined.
3. In the General FastTab, enter a template identifier and description.
4. In the remaining FastTabs, select a step and then provide a description of the step that can be used to ensure a consistent methodology.

Feedback

Submit feedback for this page .

Create 8D Report

The 8D Report can be generated from the Sales Return Order or opened using Tell Me.

To create the 8D report from Sales Return Order

1. To generate the report from the Sales Return Order page, fill in the return order and then on the Lines FastTab, choose Functions > Create 8D Report.

   > **Note**
   >
   > **If the Get Posted Document Lines to Reverse function was used to populate the lines, ensure that the item line is selected before running the Create 8D Report function.**

2. Choose the Yes button to create the 8D report and then accept the creation confirmation message.
3. On the Lines FastTab, choose Line > 8D Reports to open the generated 8D Report.
4. In the 8D Reports page, choose the Edit action. The 8D Report Card opens with the following information:
   - Status = Created
   - Customer No. and Quantity transferred from the Sales Return Order
   - Texts transferred from the default template assigned in the Quality Assurance Setup page (if used)
5. On the Home menu, choose the Show Item Tracking action to view the selected Lot-/Serial No. information.

To add 8D team members

Before any steps can be used in the 8D report, at least one Team Member must be added in the 8D Team Member FactBox.

1. In the 8D Team Member FactBox, choose the drop-down arrow and then choose Open. The 8D Team Members page opens.
2. In the Team Member Code field, the following can be entered:
   - Microsoft Dynamics 365 Business Central User; populates the Team Member Name with the user name
   - Code or Number and a name for external responsibility
3. In the Function / Responsibility field, enter a description of the user's function on the team.

4. Select the Lead checkbox for the team leader. The Team Member Name of this user will be shown in bold in the 8D Team Member FactBox. Only one user can be selected as team lead.
5. Choose the Close button to go back to the 8D Report Card page.

To assign team members and dates to steps

1. On the Home menu, choose the Release action to change the Status to *Analysis*, which allows team members to be assigned to the steps.
2. After assigning the team members, enter a date in the Implementation Date field to indicate when the step should be started.
3. For step D4, the error can be marked as a Repetitive Defect if this is a recurring issue.
4. Update the information in the steps as needed.

Note

Choosing the Finish or Reject actions will close the 8D Report, which means it is only visible by entering 8D Reports - Closed in Tell Me and then choosing the related link. For more information, see Closed 8D Reports.

Feedback

Submit feedback for this page .

Print 8D Reports

The printed 8D Report has two different views: Analysis and Documentation. This section describes the Analysis View; the Documentation View is described in Closed 8D Reports.

In the Analysis View:

- Status = *Analysis*
- All steps have empty boxes for planning purposes/notes

To print the 8D Report in the Analysis View, choose the 8D Report action on the Reports menu of the 8D Report Card.

The report request page includes an option to Show separate headers. If turned on, each step will include a header. If turned off, the header will be shown only above step D2.

In addition to the steps, the printed 8D Report includes the header information from the 8D Report Card, as well as the lot-/serial number information and team members.

See Also

Closed 8D Reports

Feedback

Submit feedback for this page .

Closed 8D Reports

8D Reports can be closed by changing the **Status** to *Rejected* or *Finished*. The closed 8D Reports are then accessible using **Tell Me**. Choose the icon, enter **8D Reports - Closed**, and then choose the related link.

The closed 8D Reports cannot be edited but can be reactivated by choosing the **Reopen** action on the **Home** menu.

The printed report for a closed 8D Report is referred to as the Documentation View. In this view:

- **Status** = *Rejected* or *Finished*
- Only the fields entered are shown, no empty boxes
- A signature box is added to the bottom of the report

The process used for printing a closed 8D Report is the same as for an active one.

See Also

Print 8D Reports

Feedback

Submit feedback for this page .

Recalls

Items are often moved through the warehouse using lot numbers and serial numbers. If a lot that is received from a vendor does not meet quality requirements, it may be necessary to have all or a part of the shipment removed from stock. Additionally, it may be necessary to recall delivered goods from the customer if items have already shipped.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up number series for recalls.	Recall Setup
Learn about the Recall page.	Recall Page
Learn how to process a recall.	Process a Recall
Learn about the recall reports	Reports

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Recall Setup

The Recall Setup contains the number series to be used with new Recall and Issued Recall records.

To set up recalls

1. Choose the icon, enter Recall Setup, and then choose the related link.
2. In the Recall Nos. field, enter the number series to be used with recalls.
3. In the Issued Recall Nos. field, enter the number series to be used with issued recalls.

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Recall Page

In COSMO Quality Assurance, the Recall page allows you to search for the selected item, lot numbers, and serial numbers to discover where items were bought, where they are used for production, and to which customers they were sold.

The Recall page is accessed using Tell Me. Choose the icon, enter Recall List, and then choose the related link. Choose the New action to create a recall or the Edit action to open an existing recall.

General FastTab

The fields on the General FastTab are described in the following table.

Field	Description
No. / Description	Unique identifier and short explanation for the Recall.
Serial No. Filter / Lot No. Filter / Item No. Filter / Variant Filter / Date Filter	Filters to be included in the Recall search.
Package No. Filter	This filter currently has no functionality.
Posting Date	Date on which the issued callback should be posted.
Add Return Receipts	Determines if return receipts are displayed in the lines. This is useful when a Sales Shipment was posted and returned.
Assigned User ID	Manually entered ID of the user that is responsible for the Recall.
Status	Current status of the Recall. The options are: *<Blank>*, *Changed*, and *Validated*. The status changes to *Validated* when the Suggest Recall Lines function is run. If one of the filter values is changed, the value is reset to *Changed* and the Recall cannot be issued until the Suggest Recall Lines function is run again.

Lines FastTab

The Lines FastTab divides the result into three groups that contain the required information:

- PURCHASE – Contains the Purchase Receipts of the selected Item / Lot No. / Serial No. and, if it exists, the Purchase Receipts of the components from which it is produced.

- INVENTORY – Lists all occurrences of the item and components that are still in stock.
- SALES – Shows the Sales Shipments of the items or, if sold separately, of the component.

The lines can be expanded to show more details of each result. To navigate to the document that relates to a result, select the line and then on the Lines FastTab, choose Line > Navigate.

Home/Reports Menus

The actions on the Home and Reports menus are described in the following table.

Menu	Action	Description
Home	Suggest Recall Lines	Populates the lines based on criteria set on the General FastTab.
	Issue	Opens the Issue Recall page, which converts the Recall to an Issued Recall where it can no longer be changed.
Reports	Test Report	Generates the Recall - Test report, which lists all entries relating to the SALES area.

Related Menu

The actions on the Related menu are described in the following table.

Action	Description
List	Opens the Recall List page, which displays all open Recalls.
Comments	Opens the Comment Sheet page, where Recall comments can be entered.
Customer List	Opens the Recall Lines page, filtered to display the sales shipments.
Inventory	Opens the Recall Lines page, filtered to display the open quantities that are still in stock.

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Process a Recall

After creating and issuing a recall, you can access the necessary recall documents.

Create a recall

1. Choose the icon, enter Recalls, and then choose the related link.
2. Choose the New action and then choose the Enter key to automatically populate the No. field.
3. On the General FastTab, enter the filters to be included in the Recall search.
4. In the Posting Date field, enter the current date.
5. Turn on the Add Return Receipts toggle to include customer return receipts.
6. On the Home menu, choose the Suggest Recall Lines action.

Issue a Recall

1. On the Related menu, choose Recall > Comments.
2. In the Comment field, type a comment for the Recall.
3. Close the Comment Sheet page.
4. On the Home menu, choose the Issue action.
5. Turn on the Print toggle to print a letter for each customer in the Recall.
6. Turn on the Replace Posting Date toggle if a date other than the date in the Posting Date field on the General FastTab of the Recall page should be used for issuing the Recall.
7. Enter a date in the Posting Date field if the Replace Posting Date toggle was turned on.
8. Choose the OK button.
9. If the Print checkbox was selected, a message opens asking if you want to print letters to customers. Choose the Yes button to print the letters or the No button to stop the letter printing process.

The Recall is issued and removed from the Recall page.

Review Issued Recall

1. Choose the icon, enter Issued Recalls, and then choose the related link.
2. Open the line for the Issued Recall.
3. Choose the Print action to generate the Issued Recall List report and print the letters to customers.

4. Comments, shipment information, and inventory information entered on the Recall can be accessed by choosing **Related > Issued Recall**.
5. Close the **Issued Recall** page.

See Also

Recall Reports

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Recall Reports

During and after issuing a recall, two reports can be generated.

Issued Recall List

The Issued Recall List report displays all customers that were included in a callback to prepare for the callback of an item(s). The Issued Recall List report is accessed using Tell Me. Choose the icon, enter Issued Recall List, and then choose the related link.

The Issued Recall List request page includes the following:

- On the Options FastTab, turn on the Print Phone No. toggle to print an internal list that includes the customer's Phone No. in the lines.
- On the Issued Recall Header FastTab, filter on the issued callback(s) to include in the report.

Recall Document

Recall Documents are the letters for customers regarding recalls. Recall Documents are created for customers during issuance or from the issued recall when the Yes button is selected in the Print letters to customers confirmation message.

You can also create a Recall Document using Tell Me. Choose the icon, enter Recall Document, and then choose the related link. Set filters in the Issued Recall Header and Issued Recall Line FastTabs and then choose the Print or Preview button.

See Also

Process a Recall

Feedback

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Reports

This section covers reports relevant to COSMO Quality Assurance, each accessed using Tell Me. Choose the icon, enter the report name, and then choose the related link.

Item Expiration Date

The Item Expiration Date report displays items via certain filter criteria by lot and the according expiration date.

Property Testing Analysis

The Property Testing Analysis report displays the development of an item's test values within the allowed upper and/or lower limits range over a period of time.

The Property Testing Analysis request page includes the following:

- On the Options FastTab, use the Item No. field to specify which item to analyze.
- On the Test Order Property Set and Test Order Property FastTabs, filter on the test property set code(s) and test order properties to include in the report.

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Integration to COSMO Products

Through the integration of COSMO Quality Assurance, you can enable extra functionalities that operate exclusively when used in conjunction with the following products:

- COSMO Process Manufacturing
- COSMO Regulatory Affairs
- COSMO Vendor Rating

These integrations are part of the COSMO Advanced Manufacturing Suite (AMS), which integrates COSMO Advanced Manufacturing Pack with other products from COSMO CONSULT. Therefore, the integration information is maintained in the AMS content.

The following table provides links to the COSMO Quality Assurance integration topics in the AMS content.

To	See
Learn about the integration between COSMO Quality Assurance and COSMO Process Manufacturing.	Integration with COSMO Process Manufacturing
Learn about the integration between COSMO Quality Assurance and COSMO Regulatory Affairs.	Integration with COSMO Regulatory Affairs
Learn about the integration of COSMO Quality Assurance to COSMO Vendor Rating.	Integration to COSMO Vendor Rating

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