

Inspection Lot Completion (QM-IM-UD)



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Icons

Icon	Meaning
	Caution
	Example
	Note
	Recommendation
	Syntax

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Inspection Lot Completion (QM-IM-UD)

Purpose

Once inspection results have been recorded for an inspection lot and the inspection is finished, you must reach a decision about the usage of the inspected material. The *Inspection Lot Completion* (QM-IM-UD) component provides you with the functions to:

- Complete an inspection (inspection completion)
- Make the usage decision for an inspection lot
- Make stock postings for inspection lots that were created as a result of goods movements (for example, to unrestricted-use stock, blocked stock, and scrap)

When you make a usage decision for an inspection lot, the system also:

- Calculates a quality score for the inspection lot
- Updates the quality level (inspection stages for next inspection lot)
- Updates the QM Information System with statistical data
- Triggers automatic follow-up actions (optional)

Integration

To use the full capabilities of the *Inspection Lot Completion* component, you must implement the following components in QM to be able to create inspection lots and to define codes in the usage decision catalog:

- *Inspection Lot Creation* (QM-IM-IL)
- *Catalog* (QM-PT-BD-CAT)

If you process inspection lots that reference objects from other integrated applications or that need to be supported by these applications, you may have to implement one or more of the following components:

- *Materials Management* (MM) / *Inventory Management* (MM-IM)
- *Production Planning* (PP) / *Production Planning for Process Industries* (PP-PI)
- *Sales and Distribution* (SD)
- *Plant Maintenance* (PM)
- *Batches* (LO-BM)

You can implement the *SAP Business Workflow* (BC-BMT-WFM) component to trigger workflow tasks that are related to the usage decision (for example, to inform a person that stock postings still need to be made or that a long-term inspection is still open).

Features

Inspection completion

You can only make the usage decision for an inspection lot when all required characteristics and processed optional characteristics have been closed. If open, long-term characteristics still exist when you complete the inspection, the system documents the completion of a short-term

Inspection Lot Completion (QM-IM-UD)

inspection. Once an inspection has been completed, you can no longer change the inspection results.

Usage decision

When you make the usage decision, you decide whether to accept or reject the goods in the inspection lot based on the results of the inspection. While you are in the transaction for the usage decision, you can also:

- Record defects
- Activate quality notifications
- Confirm activities for QM orders
- Make stock postings

Once you have made the usage decision, the inspection is completed.

Finishing an Inspection

To finish an inspection, the inspector first has the QM component evaluate the inspection results for the characteristics. All recorded results are compared with the predefined limits as well as with the valuation catalogs. The system determines, on the basis of sampling default values such as the sample size and acceptance number, whether the characteristic can be accepted or must be rejected. When all required characteristics and all processed optional characteristics for a lot have been evaluated, the inspector or another designated person can make the usage decision for the inspection lot.

When you make a usage decision, the inspection is (de facto) completed. However, if long-term characteristics remain open (have not been finished), then the inspection is completed on a short-term basis.

Inspection Data in the Usage Decision

Inspection Data in the Usage Decision

Use

In the transactions for the usage decision, you can display tables with the following inspection data:

- Overview of characteristics
- Overview of defects
- Overview of stocks for inspection lot

This information is displayed regardless of whether you are recording, changing, or displaying the usage decision.

Features

Inspection data	What you should know
Overview of characteristics	This table displays the status and valuation of the inspection characteristics for the inspection lot. If you double-click a characteristic, the system displays the results for the characteristic.
Overview of defects	<p>Information is only displayed in this table if defects have been recorded for the inspection lot.</p> <p>In this table, you can see the types of defects that were confirmed for goods in the inspection lot. This information may be helpful when you make the usage decision.</p> <p>If defect records exist for an inspection lot, inspection operation or inspection characteristic, you can also view the defect structure (see Displaying Defect Structure).</p> <p>You can also activate quality notifications for the individual defects (if they have not already been activated automatically on the basis of defect classes).</p>
Overview of stocks for inspection lot	<p>Information is only displayed in this table if the inspection lot is stock relevant.</p> <p>This table displays the fields and functions for making stock postings for the inspected materials. Depending on the results of the inspection, you can post the necessary quantities of material to various stock types (for example, available stock, blocked stock, scrap, to new material, to sample reserves, to sample usage).</p>

Completing an Inspection Without a Usage Decision

Use

You can complete an inspection without making a usage decision (for example, if you are not sure about the usage of the material but you want to complete the inspection). When you complete an inspection, you can no longer change the inspection results.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality inspection* → *Inspection lot* → *Usage decision* → *Record*.
The initial screen for recording the usage decision appears.
2. Enter an inspection lot number and choose *Usage decision (UD)*.
The screen for making the usage decision appears.
3. Choose one of the following options, depending on whether you want to complete the inspection or close the short-term characteristics:
 - *Complete inspection* (in this case, the system sets the status *inspection close completed* for the inspection lot).
If required characteristics are still open, the system displays a dialog box in which you must confirm that you want to complete the inspection. You can still access the inspection lot at a later time to make the usage decision.
 - *Edit* → *Inspection completion* → *Short-term inspection* (in this case, the system sets the status *short-term inspection completed* for the inspection lot)
4. Save the data.

Result

You cannot change the inspection results for the inspection lot unless you reset the status of the lot (*Edit* → *Reset status* → *Insp. completion* or *Short-term inspection completion*) and save the data.

Overview of Inspection Points

Overview of Inspection Points

Use

In the transactions for the usage decision, you can display an overview of all inspection points that exist for an inspection lot. The inspection points can pertain to:

- Production quantities
- Physical samples
- Equipment
- Functional locations

The overview screen contains general information about the existing inspection points. From the overview screen, you can call up additional screens or dialog boxes for more detailed information about an inspection point (for example, if you double-click the *Batch*, *Partial lot* or one of the inspection point quantity fields).

Activities

To display the inspection point overview screen, choose *Goto* → *Inspection point overview* in the transaction to record, change, or display a usage decision.

Outstanding Inspection Points

Use

When you make the usage decision for an inspection lot that includes inspection points, the system checks if any of the inspection points were not valuated during results recording. If this is the case, you can either discontinue the inspection or proceed with the usage decision.

The system determines whether unvaluated inspection points exist for inspection lots with:

- Production quantities
- Physical samples
- Equipment
- Functional locations

Prerequisites

You can only make the usage decision for an inspection lot that contains unvaluated inspection points, if you have the authorization to terminate an inspection.

Activities

When you enter and confirm the usage decision for an inspection lot with inspection points, the system automatically displays a dialog box that informs you of the unvaluated inspection points. You can:

- Proceed with the usage decision if you have the authorization to make the usage decision
- Discontinue the inspection (this is recorded in the usage decision log).
- Valuate the outstanding inspection points before you make the usage decision.



You can display a list of the inspection points that have not been valuated by choosing the function for uninspected physical samples or equipment.

If the inspection lot contains physical samples, you can display an overview of all physical samples by choosing *Goto* → *Physical samples*.

Making a Usage Decision

Making a Usage Decision

Use

Once you have finished an inspection, you can make the usage decision for the inspection lot. The usage decision specifies whether the inspected goods are accepted or rejected for use.

Prerequisites

To be able to make a usage decision, the following conditions must be met:

- The inspection lot is released
- Inspection results have been recorded for the required inspection characteristics (if the inspection lot contains inspection characteristics for which results have not been recorded, you can still make the usage decision for the lot; however, you must forcibly close these characteristics)
- An active status does not exist which blocks the usage decision
- You have the authorization to make the usage decision
- You have confirmed the receipt of a quality certificate, if a certificate was required in the goods receipt for the material

Activities before you make the usage decision

If you want to record defects and activate one or more quality notifications before you make the usage decision, see:

- [Recording Defects Before Making the Usage Decision \[Ext.\]](#)
- [Activating a Quality Notification \[Page 14\]](#)

Procedure

1. Choose *Logistics* → *Quality management* → *Quality inspection* → *Inspection lot* → *Usage decision* → *Record*.

The initial screen for recording the usage decision appears.

2. Enter an inspection lot number and choose *Usage decision (UD)*.

The screen for making the usage decision appears.

3. If you have to confirm the receipt of a quality certificate for the material before you make the usage decision, choose *Edit* → *Certificate received*.
4. In the screen block for the usage decision, enter a code for the usage decision.
5. Save the data.

Displaying the Defect Structure

Use

When you record, change, or display a usage decision for an inspection lot, you can also display the defect structure. The defect structure contains a:

- List of defects (if defects were only recorded for the inspection lot)
- Hierarchical tree structure showing where the defects were confirmed (if the defects were recorded for inspection operations or inspection characteristics)

Procedure

To display the defect structure, choose *Goto* → *Defect structure*. The system displays a dialog box containing a list or hierarchical tree structure of the recorded defects.

If the dialog box contains a hierarchical tree structure, you can drill down a selected node to display more detailed information.

Activating a Quality Notification

Activating a Quality Notification

Use

When you make the usage decision for an inspection lot, you can also activate a defect record that was recorded in an inspection as a quality notification. If you are making the usage decision for an inspection lot that was created for a calibration inspection, you can activate a defect record as a maintenance notification.

Procedure

1. Call up an inspection lot using the function to record or change the usage decision.
2. Choose the *Defects* tab in the usage decision screen.
3. Select the defect item you want to activate as a quality notification and choose *Activate notification*.

A dialog box appears in which you can enter the various information for the quality notification.

4. Enter the information as required and then choose *Continue*.

The defect item is activated as a quality notification. You can process the notification further using the functions for quality notifications.



If one or more notifications already exist for a material, customer, or vendor for which you are currently activating a quality notification, the system displays a pushbutton for displaying the related quality notifications. For more information, see [Displaying Related Notifications \[Ext.\]](#).

Entering and Saving the Usage Decision

1. Choose the possible entries help for *UD code* field.

A dialog box appears containing the contents of the usage decision catalog (catalog type 3).



If your system administrator defined a default selected set for an inspection type in Customizing, the dialog box will only contain the code groups and codes predefined in the selected set. Otherwise, all code groups and codes that are available in the usage decision catalog will be displayed.

2. If necessary, expand the code groups to find the code you need.
3. Double-click a code to copy it into the field for the usage decision code.

All pertinent information is copied into the fields for the usage decision code. In addition to the code group and code, the system copies the valuation code, quality score, and follow-up action.
4. If the inspection lot was created automatically on the basis of a goods movement, choose the *Inspection lot stock* tab to display the fields for making the stock postings.
5. Post the stocks as required.
6. Save the data.

When you save the usage decision, the system sets the inspection lot status for inspection completion.

Making Usage Decisions for Several Inspection Lots

Making Usage Decisions for Several Inspection Lots

If you want to avoid selecting an inspection lot each time you make a usage decision, you can generate a list of inspection lots that meet specific selection criteria using the work list function. From this list you can select one, some, or all of the inspection lots to process (that is, to enter a usage decision).

For additional information see [Processing Inspection Lots Without Inspection Completion \[Ext.\]](#) in the work list function.

Displaying Results for Characteristics

Use

In the usage decision screen, you can view the characteristic results that were recorded for the inspection lot you are currently processing.

Displaying results for a single inspection lot

Choose the *Characteristics* tab to view the summarized results for the inspection characteristics. Depending on the setting of the processing mode, the system displays:

- The characteristics that are only relevant for the usage decision
- All characteristics in the task list

You can switch between these views by choosing *Extras* → *Processing mode* and by selecting the desired processing mode.



Your system administrator can define which characteristics are displayed in this screen in the Customizing.

Displaying results for several inspection lots

You can also display the inspection results for several inspection lots using an evaluation function for inspection characteristics.

1. Choose *Logistics* → *Logistics controlling* → *QM information system* → *Environment* → *Evaluations* → *Characteristics* → *Inspection results*.

The screen for entering the selection criteria appears.

2. Enter your selection criteria (you should enter at least a material and inspection lot origin).
3. Choose *Execute*.

A list of inspection lots with results data is displayed.

4. Double-click an inspection lot, operation, or characteristic result to display additional detailed information.



You can display a chronological history of the inspection results for a characteristic using the function *Results history*. You can use this function when you make the usage decision and during results recording. For more information about this function, see [Display of Results History \[Ext.\]](#).

Stock Postings

Stock Postings

Use

If an inspection lot is stock-relevant, you can post the stock for the inspection lot manually while you are in the process of making the usage decision. On the basis of your stock postings, the system makes the corresponding postings in the *Materials Management* component.

You can update the stock at any point in the process of making the usage decision, as long as open quantities to be posted exist:

- [Before You Make a Usage Decision \[Page 22\]](#)
- [When You Are Making a Usage Decision \[Page 23\]](#)
- [After You Have Made a Usage Decision \[Page 24\]](#)



If an inspection lot is not stock-relevant, you cannot make stock postings with the usage decision functions. Examples of inspection lots that are not stock-relevant include all manually created inspection lots and lots that were not created as a result of goods movements (for example, a goods movement for a production order).

Features

Types of Stock Postings

You can post quantities of material from an inspection lot to the following destinations:

- To unrestricted-use stock
- To scrap
- To sample usage
- To blocked stock
- To new material
- To sample reserves
- Return delivery



If you post a batch material from **goods-receipt blocked stock** to another destination, you must specify a batch number when you make the posting.

When you make a stock posting to one of these destinations, the system creates a material document to record the stock posting. In the material document, you can specify:

- A reason for making the stock posting
- The date for the material document
- The date you made the stock posting



If necessary, you can specify a posting date in a prior period.

- A text for the header of the material document
- For postings to scrap and sample, you can also specify a cost center.



The system only displays the entry field for posting a return delivery if the inspection lot was either created on the basis of a goods receipt with reference to a purchase order or a goods receipt with reference to an order.

If you make a posting for a return delivery, you must specify a reason for the return delivery. You can select a reason by using the possible entries help for the field.

The above conditions also apply to stock transfers. In this case, you must enter or select the purchase order.

Automatic Proposal for Stock Postings

For usage decision codes in inspection catalog type 3, you can predefine automatic proposals for stock postings. You do this by maintaining the selected set codes as follows:

- Specify a stock posting proposal for a code

For example, for the usage decision code to accept an inspection lot, you can set the stock proposal indicator so the system will automatically post the stock to unrestricted-use stock.
- Set the indicator for background processing

If you set this indicator for a code, the system posts the stock automatically. If you do not set this indicator, you must confirm the stock proposal manually.
- Set the batch status

You can specify that the system change or retain the current batch status with the usage decision (for example, no change to batch status, change batch status to “unrestricted,” or change batch status “restricted”).

Stock Postings for Destructive Inspections

The system takes the quantities of materials destroyed during a quality inspection into consideration when you make the stock postings for an inspection lot. When you call up the screen for stock postings while making the usage decision, the system automatically calculates the destroyed quantity and makes a stock proposal to be posted to sample usage. The system takes the quantities that have already been posted to sample usage into consideration.

For the system to calculate the destroyed quantity of material in an inspection, you must activate the control indicator for a destructive inspection for each inspection characteristic whose material quantities are to be included in this stock proposal.

The system carries out the stock posting automatically when it makes an automatic usage decision or when you make a usage decision with automatic stock postings.

Stock Postings



For destructive inspections, you can use enhancement QEVA0009 to predefine the quantity to be posted to sample usage.

Material Documents for Inspection Lots

Use

This function allows you to display a list of all material documents that were created for a stock-relevant inspection lot. The list contains the material documents that were created for the following activities:

- Stock posting for the creation of an inspection lot (for example, goods receipt) and all subsequent postings that increase in the inspection lot quantity.
- Corrections made to the actual quantity of an inspection lot.
- Stock postings made with the usage decision.
- Stock transfers between different storage locations or plants.

When you display a list of material documents, you can select a desired document and display its contents.

Activities

To display a list of material documents for a stock-relevant inspection lot, call up the function for creating, changing, or displaying the usage decision and then choose *Extras* → *Material documents*.

Before You Make a Usage Decision

Before You Make a Usage Decision

1. Choose *Logistics* → *Quality management* → *Quality inspection* → *Inspection lot* → *Usage decision* → *Record*.
2. Enter an inspection lot number and choose *Usage decision (UD)*.
3. In usage decision screen, choose the *Inspection lot stock* tab.



This tab contains two columns. In the left-hand column (*Quantity posted*), the system displays the amounts that have already been posted to the individual stock types. In the right-hand column (*To be posted*), you enter the amounts that you want to allocate to the various stock types.

4. Enter the quantities for the desired stock types.
5. Save the changes.

The *To be posted* quantities are updated in the system. The next time you call up the function for the usage decision and display the tab for inspection lot stocks, the *Quantity posted* column will include these posted stocks.

When You Are Making a Usage Decision

Follow the procedure for making a usage decision as described in [Making a Usage Decision \[Page 12\]](#). When you save the usage decision, the system automatically displays the screen *Stocks for insp. lot*. Proceed as follows:

1. The screen area for the quantity allocations is divided into two columns. In the left-hand column (*Posted*), the system displays the amounts that have already been posted to the individual stock types. In the right-hand column (*To be posted*), you enter the amounts that you want to allocate to the various stock types.
2. Enter the quantities for the desired stock types.
3. Save the changes.

The system updates the *To be posted* quantities and returns to the initial entry screen with the message that the usage decision for the inspection lot has been saved.

The next time you access the screen for the stock postings, you will see that the system has added the *To be posted* quantities to the *Posted* quantities.

After You Have Made a Usage Decision

After You Have Made a Usage Decision

Use

After you have made the usage decision, you have two options for posting inspection lot stocks. You can post the stocks for:

- A single inspection lot
- Several inspection lots

Posting Stocks for a Single Inspection Lot

1. Choose *Logistics* → *Quality management* → *Quality inspection* → *Inspection lot* → *Usage decision* → *Change with history*.
2. Enter an inspection lot number and choose *Usage decision (UD)*.
3. In the usage decision screen, choose the *Inspection lot stock* tab.
4. Enter the quantities of stock to be posted in the appropriate field(s).
5. Save the changes.

The *To be posted* quantities are updated in the system. The next time you call up the function for the usage decision and display the tab for inspection lot stocks, the *Quantity posted* column will include these posted stocks.

Posting Stocks for Several Inspection Lots

If you want to post stocks for several inspection lots, you can generate a list of inspection lots that meet your selection criteria using the work list function. You can then make the stock postings for one or more lots in this list. For more, information see [Processing Inspection Lots with Open Quantities in Inspection Stock \[Ext.\]](#).

Displaying the Stock Overview

1. Call up an inspection lot using the function to record, change, or display a usage decision.
2. In the usage decision screen, choose *Environment* → *Stock overview*.

A screen containing the following information appears:

- A stock overview for a material
- Quantity of material in unrestricted-use stock
- Quantity of material in inspection stock
- Quantity of material in reserved stock

Stock Postings for Serialized Materials

Stock Postings for Serialized Materials

Use

In the transactions for the usage decision, you can make stock postings for inspection lots with serialized parts or materials. You can select the single units by serial number and selectively post them to the following different stocks:

- Unrestricted-use stock
- Scrap
- Sample
- Blocked stock
- New material
- Reserves
- Return delivery (with reference to a purchase order or an order)
- Miscellaneous quantity (if activated by means of a customer enhancement)

If you process an inspection lot with 10 serialized single units, for example, you can post five units to unrestricted-use stock, 2 units to scrap and 3 units to a new material. On the basis of these postings, the system creates three separate object lists from the original object list, which are then assigned to the individual material documents. This allows you to trace the single units using the functions of inventory management.

Prerequisites

To be able to post stocks for serialized parts or materials, you must make sure the following conditions have been met:

- The material has a serial number profile assigned to it for the corresponding operations (for example, movement types for stock postings).
- The indicator for inspecting single units is set for the corresponding inspection type in the material master.

Activities

When you save the usage decision, the system prompts you to specify the relevant serial numbers for each posting line. If you post the complete quantity of the inspection lot to exactly one stock, the system assigns the serial numbers automatically in the background.

Stock Posting Reversals

Use

You can cancel and reverse a stock posting for an inspection lot for which a usage decision has already been made (for example, if someone made a mistake during a goods receipt posting, which requires you to reverse the goods movement).

Integration

To reverse a stock posting, you must perform the following tasks in the specified components:

1. *Materials Management (MM)*

Create and process a return delivery with reference to the original purchase order using the functions of *Inventory Management (IM)*.

2. *Quality Management (QM)*

Cancel the inspection lot in QM using the function to change the usage decision.

Prerequisites

To be able to reverse a stock posting for an inspection lot, the following conditions must be met:

- A usage decision has been made for the inspection lot.
- The goods in the inspection lot have been posted from inspection stock to blocked stock or unrestricted-use stock.



If you posted the goods to a stock other than blocked stock or unrestricted-use stock (for example, to scrap), you must first post the stock back to blocked stock before you can reverse the original stock posting.

Reversing Stock Postings

Reversing Stock Postings

1. Choose *Logistics* → *Materials Management* → *Inventory Management* → *Goods Movement* → *Goods receipt* → *For purchase order* → *PO number known*.

The initial screen for creating a goods receipt for a purchase order appears.

2. In the field for the movement type, enter 102 (goods receipt for a purchase order into warehouse - reversal).
3. In the field for the purchase order, enter the purchase order number for the original goods receipt.



You can copy the purchase order number from the inspection lot.

4. Choose *Enter* to display the selection screen for the purchase order items.
5. Select the purchase order item for which you want to create the goods receipt and set the *Stock type* indicator **to the stock to which the goods were originally posted** with the usage decision (for example, *F* for unrestricted-use stock or *S* for blocked stock).
6. Save the goods receipt and exit the *Materials Management* component.
7. Choose *Logistics* → *Quality management* → *Quality inspection* → *Inspection lot* → *Usage decision* → *Change with history*.

The initial screen for changing a usage decision appears.

8. Enter the number of the inspection lot for which you previously made the usage decision and choose *Usage decision (UD)*.
9. To cancel the inspection lot, choose *Usage decision* → *Functions* → *Cancel lot* in the usage decision screen.

Batch Management

You can use the following functions to process batches within the scope of the usage decision:

- [Change the current batch status \[Page 30\]](#) (from “unrestricted” to “restricted” or vice versa)
- [Display a list of all batches for a material \[Page 31\]](#)
- [Display a where-used list for batches \[Page 32\]](#)
- [Display batch characteristic values \[Page 33\]](#)
- [Post a batch to a new material \[Page 34\]](#)

Changing the Batch Status

Changing the Batch Status

Use

If the inspection lot material for which you are making a usage decision is processed in batches, you can display and change the current status of a batch based on the results of the inspection (for example, if the current status of the batch is “unrestricted” and the results of the inspection require you to reject the batch, you can change the status to “restricted”).

Procedure

In the screen for the usage decision, choose *Batch status*. A dialog box is displayed, in which you can change the batch status.



You can have the system change the batch status automatically when you make the usage decision. To do this, you must specify a proposal for the stock posting and batch status when you maintain a usage decision code in catalog type 3 (usage decisions). When you enter and save this usage decision code, the system:

- Posts the stock to the proposed location (for example, to unrestricted-use stock, to scrap, to sample, and so on).
- Changes or retains the current batch status according to your proposal (for example, no change to batch status, batch status “unrestricted,” or batch status “restricted”).

Displaying a List of All Batches

Use

When you make the usage decision for an inspection lot that contains a batch material, you can display a list of all existing batches for the material.

Procedure

1. Call up an inspection lot using the function to record, change, or display a usage decision for an inspection lot.
2. Choose the *Inspection lot stocks* tab and then choose *Goto* → *Batch list*.

Displaying a Where-Used List for Batches

Displaying a Where-Used List for Batches

Use

When you make the usage decision for an inspection lot that contains a batch material, you can also display information about the origin and use of the batch material. For example, you can identify which batches of:

- A raw material or semi-finished product are contained in a certain batch of a finished product (top-down analysis)
- Finished or semi-finished products contain a certain raw material batch (bottom-up analysis)

Procedure

1. Call up an inspection lot using the function to record, change, or display a usage decision.
2. In the usage decision screen, choose *Extras* → *Batches* → *Batch usage*.
A selection screen for the batch usage data is displayed.
3. Enter a level for the batch where-used list (optional) and specify whether you want a top-down or bottom-up analysis.
4. Choose *Execute* to generate and display the batch where-used list.

Displaying Batch Characteristic Values

Use

When you make the usage decision for an inspection lot, you can display the class characteristic values for a batch to compare them the results recorded for the inspection characteristics.

Procedure

Choose *Extras* → *Batches* → *Batch values* in the usage decision screen. The system displays a dialog box that contains the following information:

- Name of class characteristic
- Batch characteristic value
- Inspection result for characteristic

Posting a Batch to a New Material

Posting a Batch to a New Material

Use

When you post the stocks for an inspection lot, you can also post a batch to a new material. This may be necessary if the characteristics of a batch have changed to such an extent that they no longer satisfy the quality requirements for the current material.

Procedure

1. Call up an inspection lot using the function to record or change a usage decision for an inspection lot.

2. Choose *Goto* → *New material* in the screen for inspection lot.

A dialog box appears in which you can enter the new material and batch number.

3. Enter an identifier for the new material and a batch number. If necessary, use the possible entries help to select the new material.



If a stock posting has already been made for this inspection lot, the system proposes a batch number. You can accept or change this number.

4. Choose *Continue*.

If the new batch number does not exist, the system prompts you to create the new batch.

5. Choose *Yes*.

A second dialog box is displayed requesting whether the new batch should be released.



This dialog box is only displayed if the batch status management function is active for your plant.

6. Choose *Yes* or *No*.

A message is displayed indicating that the new batch has been created.

Transfer of Inspection Results to Batch Class

Use

If the general characteristics in the batch classification for a material are linked to inspection characteristics, the system automatically transfers the inspection results for these characteristics to the batch class when you make the usage decision.

Prerequisites

The system can only transfer inspection results to a batch class if:

- The material was designated as a batch material in the material master
- The master inspection characteristics are linked to the general characteristics in the Classification System
- A batch class was assigned to the material in the *Classification* view of the material master

Features

If you call up the transaction to display or change the usage decision after you have made the usage decision, the results of the batch classification will be contained in the usage decision log. The log displays the following information:

- Date and time when the inspection results were transferred
- Material number
- Batch number
- Description of general characteristic
- Type of valuation (automatic, manual or previously valuated)
- Characteristic values in the batch classification

Transfer of Inspection Decision to Batch Class

Transfer of Inspection Decision to Batch Class

Use

If standard characteristics LOBM_UDCODE and LOBM_QSCORE are contained in the batch classification for a material, the system automatically transfers the usage decision code and the quality score to the batch class when the usage decision is made for an inspection lot.

Prerequisites

The usage decision code and the quality score are only transferred to the batch class if the following conditions have been fulfilled:

- The standard characteristics LOBM_UDCODE (usage decision code) and LOBM_QSCORE (quality score) have been copied from the delivery client into the current client (see Customizing for *Logistics - General* under *Batch Management* → *Batch Valuation Update* → *Standard Characteristics*).
- Both characteristics have been assigned to a batch class and the batch class in turn has been assigned to the material.

Activities

If the above prerequisite conditions have been met, no explicit user action is necessary during inspection lot processing. The standard characteristics are automatically valuated in the background when the usage decision is recorded or changed for an inspection lot.

Changing a Usage Decision

Use

Once a usage decision has been made for an inspection lot, you cannot change the results of the inspection. In some situations, however, it may be necessary to change the usage decision. You can change a usage decision:

- With history
- Without history

When you change a usage decision with history, the system creates a change document that contains the relevant fields of the inspection lot with the values before and after the change.

In some cases, you can only change a usage decision with history (for example, if the changes to a material must be documented). The system notifies you of this if it applies to the inspection lot you are changing.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality Inspection* → *Inspection lot* → *Usage decision* → *Change with history*.

The initial screen for recording the usage decision appears.

2. Enter an inspection lot number and choose *Usage decision (UD)*.

The screen for the usage decision appears.

3. Change the usage decision data as necessary. You can change the:

- Code and code group for the usage decision
- [Quality score \[Page 40\]](#)
- Follow-up action

If you change the usage decision code, the system resets the quality score (if derived from the usage decision) and the follow-up action.

See also:

[After You Have Made a Usage Decision \[Page 24\]](#)

[Displaying Results for Characteristics \[Page 17\]](#)

Quality Scores for Inspection Lots

Quality Scores for Inspection Lots

Use

When you make a usage decision for an inspection lot created for goods receipt, the quality score must also be determined for the lot. A quality score is a statistical value that describes the quality of an inspection lot. A quality score can be entered directly or can be calculated by a predefined procedure. A procedure for calculating a quality score can be defined for an inspection type in the material master. You then activate the inspection type that contains a quality score procedure when you create or change a material master.

Features

Quality Score and Quality Score Procedures

For example, a quality score can be derived from the:

- Usage decision
- Share of defects in the lot
- Share of defects for the characteristics
- Quality score for the characteristics

In the first instance, the material is assigned an inspection type that derives a quality score from the usage decision in the inspection catalog. In the other instances, the inspection type contains a procedure that calculates the quality score.

To use a quality score procedure that depends on data from:

- The weighted share of defects in a lot, you must inspect with a plan. Furthermore, the data that defines the importance of the characteristics must be maintained.
- The quality score for the characteristics, you must use a plan. Furthermore, a defect class must be assigned when a characteristic is rejected during results recording.

In Practice

The quality score can be:

- Defined for each usage decision code
- Calculated by the quality score procedure

When you access the screen for entering the usage decision for the inspection lot, the quality score may already be calculated and displayed, if the score is determined from the procedure defined for the material. This value is not overwritten when you select the usage decision code group and code. Therefore you could end up with a quality score of 100 from the usage decision although the inspection lot has been rejected.

The upper and lower limiting values for the quality score are defined at the client level in the Customizing application.

Displaying the Quality Score

1. Choose *Logistics* → *Logistics controlling* → *QM information system* → *Environment* → *Evaluations* → *Lots* → *Q-score time line*.

The screen for selecting inspection lots appears.

2. Enter your selection criteria.



You should enter at least a material and an inspection lot origin. Since this graphic is useful for displaying the quality score for a specific vendor, you should also enter the vendor.

3. Choose *Execute*.

A time line of the quality scores for a specific material and vendor are displayed. The quality scores are stored in the individual inspection lot records and are based on the usage decisions. The dates on the time axis represent the dates when the individual inspection lots were created.

4. To display the data for an inspection lot, double-click a quality score in the graphic.

Recalculating the Quality Score

Recalculating the Quality Score

Use

When you call up an inspection lot to make the usage decision, the system may display a message that the quality score must be recalculated. This can occur if the share of defects in the inspection lot differs from the share that had been previously recorded for the inspection lot.

If a procedure to calculate the quality score is assigned to the material and the procedure uses the share of defects as a basis for the calculation, you must make sure that the quality score is recalculated.

Procedure

In the transaction for recording the usage decision, choose *Edit* → *Calculate Q-score*. The system automatically recalculates the quality score and displays the new value. Once the new score is available, you can change it manually.

Activity Confirmations for Operations

Use

During a quality inspection, you can track the appraisal costs incurred at a work center for the activities performed in an operation. When you record inspection results or make the usage decision, you can confirm values for various activity types (for example, set-up time, machine time, or labor time) to a QM order. The QM order is evaluated in the *Controlling* (CO) component for purposes of calculating the costs.

When you record or change the usage decision, you can:

- Enter or display values for activity types
- Display a corresponding cost report

Prerequisites

A QM order has been created and assigned to the material.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality inspection* → *Inspection lot* → *Usage decision* → and then one of the following options:
 - *Record*
 - *Change with history*
 - *Display*

The corresponding initial screen for the usage decision appears.
2. Enter an inspection lot number and then choose *Usage decision (UD)*.
3. In the usage decision screen, choose *Edit* → *Confirm activities*.

The confirmations overview dialog box appears. If you are in the display mode, you can only view or print the confirmation values. If you are in the record or change mode, you can display, print and enter new confirmation values.
4. To enter new confirmation values, choose *Enter confirmation*.

A second dialog box appears in which you can enter the values for the activity types.
5. To display the cost report for the QM order, choose *Extras* → *Costs* → *Cost report QM order*.

All costs that have been debited to the QM order are displayed.

Defective Quantity in an Inspection Lot

Defective Quantity in an Inspection Lot

Use

When you are ready to make a usage decision for an inspection lot, you can also record the quantity of units that were rejected in the inspection lot because they were defective. This quantity, referred to as the **defective quantity** is based on the sample quantity (that is, the quantity that was actually inspected).

The defective quantity is used for the following purposes:

- The defective quantity can be quoted in a letter of complaint to a vendor
- The defective quantity is updated in the QM information system and used for evaluations (for example, summarized figures for defective quantity and ratio of defective quantity to sample quantity)

When you use the functions to change or display the usage decision, you can also change or display the defective quantity.

For information about how to confirm the defective quantity in an inspection lot, refer to the procedure [Recording the Defective Quantity \[Page 43\]](#).

Recording the Defective Quantity

1. Call up an inspection lot using the function to record or change the usage decision.
2. In the usage decision screen, choose *Edit* → *Defective quantity*.

A dialog box for the defective quantity appears. This dialog box contains fields for the actual lot quantity, inspected quantity, and defective quantity in the lot, as well as functions for:

 - Proposing the defective quantity

If a fraction of nonconforming units exists for the inspection lot, the system can automatically calculate and propose the defective quantity (for example, if the fraction of nonconforming is 5% and the sample quantity is 100, then the proposed defective quantity is 5).
 - Inspecting the entire lot quantity

If you choose this function, the system automatically changes the value of the inspected quantity to the value of the actual lot quantity.
3. Perform one of the following steps:
 - Enter a value for the defective quantity and then choose *Continue*.
 - Choose the function to have the system propose the defective quantity and then choose *Continue*.
 - If the inspected quantity differs from the actual lot quantity, choose the function to have the system change the value of the inspected quantity to the actual lot quantity.

The dialog box is closed.

Follow-up Actions

Follow-up Actions

Use

When quality-related defects are confirmed, you must often initiate specific corrective actions (tasks) to eliminate the source of a problem. For example, these tasks could involve:

- Modifications to the production process
- Changes to the composition of the product
- New procurement procedures

You sometimes release the inspected goods only after certain tasks have been carried out, such as follow-up inspections, reworking or repairing the product, or more specific laboratory tests.

You can use either quality notifications or follow-up actions for this purpose. The standard system contains several follow-up actions listed below, which are assigned to respective function modules in the Customizing application.

The tasks for maintaining follow-up actions are carried out in the Customizing application. The follow-up actions are linked to usage decision codes. You must maintain the usage decision codes in the catalog for usage decisions (catalog type 3).

Selecting Follow-Up Actions

In the characteristic overview screen, the area for the usage decision also contains a field in which you can enter a follow-up action. Use the possible entries help for the field to select a follow-up action. The follow-up actions that have been defined in Customizing for the standard system include the following:

- MAIL
Send a standard mail when the usage decision is made
- MAIL2
Send a mail with the [usage decision data \[Page 46\]](#) when the usage decision is made
- MAIL3
Send mail with the [usage decision data \[Page 46\]](#) and a long text when the usage decision is made
- MANUAL
Execute follow-up action manually (no function)



If an inspection lot is rejected, you can send a mail as a follow up action, advising the purchasing department of the poor-quality delivery of goods from a vendor.

Inspection Lot Status Change

In the Customizing application, your system administrator can assign a general status management transaction to a follow-up action. This will cause the assigned status to be reflected in the inspection lot status (for example, when a follow-up action has been carried out, the status "follow-up action carried out" will be set for inspection lot).

Usage Decision Data in a Mail for a Follow-up Action

Usage Decision Data in a Mail for a Follow-up Action

The usage decision data in a follow-up action mail includes the following information:

- Material document number
- Material
- Total lot quantity
- Sample quantity
- Completed number and description of stock postings
- Usage decision code
- Lot valuation
- Quality score
- Name of person who made the usage decision
- Long text (if applicable)

Displaying Object Links

Use

The *SAP Business Workflow* and *SAP ArchiveLink* components support your activities for inspection and quality notification processing. Using the function for displaying object links, you can view the following objects that may be linked to an inspection lot or quality notification:

- Archived documents
- Linked work items
- Linked IDocs

Displaying object links for inspection processing

You can display object links while using the functions for the usage decision.

1. In the usage decision screen, choose *Environment* → *Object links*.
A dialog box is displayed in which you must choose the type of object you want to display.
2. Choose an object type and then choose *Continue*.
A log is displayed showing the work items that were processed for the inspection lot.

Displaying object links for notification processing

Both archived documents and work items are relevant objects for notification processing. You can display work items for the overall notification and for individual notification tasks. However, you can only display archived documents for the overall notification. To display the object links when you are using the functions for the quality notifications, carry out the following steps:

1. Call up a quality notification in the create or change mode.
2. Depending on whether you want to display objects for the overall notification or for a notification task, perform the appropriate steps below:

For the overall notification

- a. In the notification, choose *Environment* → *Object links*.
A dialog box is displayed in which you must select the type of object you want to display.
- b. Choose an object type and then choose *Continue*.
An archived document, a linked IDoc, or a log of the work items is displayed.

For a notification task

- a. In the notification, choose the *Tasks* tab.
The task overview is displayed.
- b. Select a task and then choose *Environment* → *Object links*.
A dialog box is displayed in which you must select the type of object you want to display.

Displaying Object Links

- c. Choose an object type and then choose *Continue*.

An archived document, a linked IDoc, or a log of the work items is displayed.

Automatic Usage Decision

Use

If the goods in an inspection lot are confirmed to be free of defects in an inspection, the system can complete an inspection automatically, provided certain prerequisite conditions have been met. In the automatic usage decision, the system automatically

- Completes the inspection lot
- Makes the usage decision
- Makes the relevant stock postings, thereby releasing the goods from inspection stock

Prerequisites

The system can only make an automatic usage decision if the following conditions have been met:

- No characteristic has been rejected in the inspection lot
- All required characteristics have been confirmed and closed
- No defect records exist for the inspection lot
- An automatic usage decision has been planned for the material

Features

The automatic usage decisions are carried out by a program that is executed periodically by the job management function. A job must be created for this purpose which is repeated at various intervals.

See [Automatic UD for Inspection Lots or Inspection Lots for Orders \[Ext.\]](#) in the work list function for information on how to make automatic usage decisions for several inspection lots.

If you want to use the function for the automatic usage decision, be sure to consider the following points:

- The parameters for the automatic usage decision is defined in the Customizing application. In the QM plant settings, you define the time interval that must expire after an inspection lot is created and before an automatic usage decision can be made. This allows you to intervene manually in the automatic process.
- Skipped lots are also taken into consideration when the automatic usage decision is made. A distinction is made between normal and skipped lots when the parameters are defined.

Repairs Processing Using Inspection Lots in QM

Repairs Processing Using Inspection Lots in QM

Purpose

If goods that have already been delivered to a customer are returned (for example, because of a technical defect or a request for repairs), you can process the return delivery in a quality inspection. You use the inspection lot to carry out a quality inspection (technical check) to determine whether or not the goods can be repaired.

Prerequisites

To process goods returned for repair using inspection lots, the following conditions must be met:

- In the *Sales and Distribution* (SD) component, a repair order (sales order with a repair item) must exist for the returned material or device.
- The inspection type assigned to inspection lot origin 05 (*Miscellaneous goods movement*) in Customizing for *Inspection Lot Creation* must be active for the returned material in the material master.

Process Flow

1. A customer files a complaint about the delivery of defective goods.
2. An authorized person in *Sales and Distribution* (SD) creates a sales order with a repair item for the return delivery.
3. The customer returns the goods to your company. When the return delivery is received:
 - The goods receipt is posted to the corresponding sales order.
 - The goods are posted to *Sales order stock to be inspected*. This stock is controlled exclusively by QM.
 - The system automatically creates an inspection lot.
4. You process the returned goods in a quality inspection. During the inspection, you can record inspection results and defects.#
5. You make the usage decision for the inspection lot and post the goods to the appropriate stock(s), based on the results of the inspection. You can post the goods to:
 - *Unrestricted-use stock* (for example, if repairs are not required)
 - *Blocked sales order stock* (if repairs are required)
 - *Scrap* (for example, if the goods cannot be repaired)
6. When you make the usage decision, the system:
 - Sets a status in the sales order for the repair order item that the usage decision has been made
 - Updates the stock postings and stock allocations in the repair order



If you are processing serialized materials, you must manually retrieve the information for the stock postings in the repair order from the serial number master record.

