

Basic Data (QM-PT-BD)



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Icons

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Basic Data (QM-PT-BD)

Purpose

In the basic data (master data), you store information that is used often. In QM, the following master records are available:

- [Inspection Method \[Page 78\]](#)
- [Master Inspection Characteristic \[Page 34\]](#)
- [Catalog \[Page 10\]](#)
- [Sampling Procedure \[Page 96\]](#)
- [Dynamic Modification Rule \[Ext.\]](#)
- [Sampling Scheme \[Page 113\]](#)
- [Sample-Drawing Procedure \[Ext.\]](#)

Implementation Considerations

If you use the basic data as a copy model, it will be considerably easier to enter data into the system.

Integration

You can:

- Include catalog data in master inspection characteristics, task lists, and notifications
- Include master inspection characteristics in task lists
- Include inspection methods in master inspection characteristics and inspection characteristics contained in a task list
- Include sampling procedures in inspection characteristics used in a task list
- Include dynamic modification rules in inspection characteristics and in the task list header
- Assign sample-drawing procedures to task list headers

Features

The *Basic Data* component contains the following functions:

- [Version management \[Page 151\]](#) (only for inspection methods and master inspection characteristics)
- [History management \[Page 148\]](#) (for example, for inspection methods and master inspection characteristics, but not for catalogs)
- The system documents all changes that are made to the master records.
- Use of the following master records as copy models to simplify the entry of data:
 - Inspection methods
 - Master inspection characteristics

- Sampling schemes
- Sampling procedures
- Dynamic modification rules
- Sample-drawing procedures
- Catalogs
- Selected sets
- Search for suitable master record

With inspection methods and master inspection characteristics, for example, you can limit the search for the desired master record using various criteria (for example, key date).



If you do not specify a key date, for example, the system displays all valid versions of the master record.

- Where-used lists for master inspection characteristics, inspection methods, code groups, dynamic modification rules and sampling procedures.
- Central replacement function for master inspection characteristics, inspection methods, dynamic modification rules and sampling procedures.

Catalogs (QM-PT-BD-CAT)

Catalogs (QM-PT-BD-CAT)

Purpose

You use catalogs to manage, uniformly define, and standardize information (for example, defect types, follow-up actions, tasks or characteristic attributes) on a client-wide or plant-wide basis. The catalogs can help you to record and subsequently evaluate qualitative data, and to describe problems.

In the catalogs, you assign each unit of information a unique alphanumeric code and an explanatory text.

Integration

You can:

- Directly assign catalogs to **master inspection characteristics**, (that is independently of the inspection method), or assign them using the inspection method.
- Store information at characteristic level in **tasks lists** with the help of catalogs
- Use the catalogs to make it easier to record inspection results, defects, and defect locations during **inspection lot processing**
- Make usage decisions during **inspection lot completion** with the help of catalog 3
- Use the catalogs to describe defect items, tasks, activities, and causes in **quality notifications, maintenance notifications, and service notifications**

Features

You can:

- Define catalog types P through Z in [Customizing \[Ext.\]](#) Catalog types 0 through 9 and A through P are predefined in the R/3 System. The standard system contains the following catalog types (among others):

Catalog Types	Short Description
1	Characteristic attributes
2	Tasks
3	Usage decisions
4	Events
5	Causes
6	Results of defects
8	Activities (QM)
9	Defect types
A	Activities (PM)
B	Object parts
C	Overview of damage

D	Coding
E	Defect locations

- Create and change **code groups** in a catalog type
- Group several **codes** together into code groups
- Create **selected sets** at plant level that contain codes from different catalogs

Catalog

Catalog

Definition

The catalog contains unique, non-numerical data in the system that is defined at client or plant level.

Use

You use catalogs to manage, uniformly define, and standardize information. They can help you to record and subsequently evaluate qualitative data, and to describe problems.

Structure

Catalogs are hierarchically structured:

- Catalog types are defined in the R/3 System that you maintain in [Customizing \[Ext.\]](#). You can also create your own catalog types.
- You can define your own code groups and codes for each catalog type.
- You group together codes into code groups at client level.
- The lowest level of the information structure contains the codes, which are in code groups or selected sets.
- You can combine codes from different code groups in selected sets. These selected sets are defined at plant level.

Integration

You can access the information stored in catalogs from master inspection characteristics and task lists. You also have access when processing inspection lots or quality, maintenance and service notifications and the usage decision.

Code Group

Definition

Code groups are used to combine and structure codes within a catalog type.

Use

You use code groups at client level to group [codes \[Page 16\]](#) that have the same contents or relate to one another, within a [catalog type \[Page 10\]](#). Codes, that are assigned to a code group are also known as group codes.



When you maintain the code group index, the system locks the required catalog type for other users. However, if you use the individual maintenance function, only the required code group is locked.

You can create texts for code groups and codes in different languages.

Structure

You can group together codes for different colors, surface characteristics or usage options:

Code Group	Overview of Codes
Color	Red
	Brown
	Blue
	Violet
	Yellow
	White
Surface characteristic	Rough
	Smooth
	Matt
	Shiny

Integration

- You can copy code groups or individual group codes into [selected sets \[Page 21\]](#).
- Code groups can be used in inspection plans or master inspection characteristics, depending on the processing status:

Status	Effects
<i>Being created</i>	You cannot use the code group yet in the master inspection characteristic or inspection plan.
<i>Released</i>	You can use the code group in other applications.

Code Group

<i>Can no longer be used</i>	The code group is not to be used in the future. It can, however, still be in use.
<i>Deletion flag</i>	<p>In the deletion process, the system checks whether the code group is being used [Page 15]. If there is no link to the code group, then it is deleted. If there is a link, then you cannot delete the code group.</p> <p>When the catalog entries code and code group are first used, a usage indicator is set. This prevents these objects from being accidentally deleted.</p>

Creating and Editing Code Groups

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Catalog* → *Code group* → *Edit*
2. Choose a catalog and enter a key for the code group.



To display codes that have already been created, search using the generic entry (*). Qualify the generic entry as far as possible, to optimize the system performance, when searching.

If you enter a generic code group key, when creating or editing a code group, the system locks all code groups in the catalog for other users.

3. Choose *Create/change*.
4. On the overview screen for editing code groups, proceed as follows, depending on whether you want to create or change a code group:

	Creating a Code Group	Changing a Code Group
a)	Choose <i>New entries</i> The code group table is ready for input.	In the table, edit: <ul style="list-style-type: none"> • short text for the code group • Status of the code group • Long text for the code group
b)	In the table, enter the following data: <ul style="list-style-type: none"> • Code group key • Code group key • Status of the code group • Long text for the code group (optional) 	Choose Classification [Ext.] and enter data for the classification of the code group.
c)	Choose <i>Classification</i> and enter data for the classification of the code group (optional).	



When you edit the status, the system checks your authorization.

If you transport code groups for all clients, any long texts that exist are not included.

5. Choose *Save*.

Additional Functions on the Overview Screen for Editing Code Groups

Function	Menu Path/ Pushbutton
Print standard list	<i>Table view</i> → <i>Print</i> → <i>Standard list</i>
Translation	<i>Edit</i> → <i>Translation</i>

Creating and Editing Code Groups

Choose language for catalog	<i>Utilities</i> → <i>Choose languages</i>
Switch between display and change mode	<i>Change</i> → <i>Display</i> pushbutton
Copy code group	<i>Copy as...</i> pushbutton
Delete code group (only possible if the code group does not contain any codes and is not being used [Page 15] in any other master record)	<i>Delete</i> pushbutton
Print variable list	<i>Variable list</i> pushbutton
Create or change long text	<i>Long text</i> pushbutton

Displaying the Use of Code Groups

Use

Code groups can be referenced in master inspection characteristics and inspection characteristics in a task list. The where-used list contains task lists, in which a code group is used.



A where-used list **cannot** be displayed for code groups that are referenced in master inspection characteristics but not in task lists.

Procedure

To display the usage overview for code groups, proceed as follows:

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Catalog* → *Code group* → *Where-used list*.
2. On the initial screen, enter a catalog type and a code group.



You cannot display where-used lists for code groups in catalogs **1** (characteristic attributes) and **3** (usage decision), since code groups in this catalog type are **not** used in task lists.

3. Choose *Usage*.

If the code group is used in a task list, a usage overview appears which displays the following data:

- Catalog type
- Name of the code group
- Task list type, task list group, group counter and task list description
- Operation number
- Characteristic number and characteristic description
- Key date (*Valid from*)

4. In the usage overview, you can call up other additional functions:

Overview	Function	Menu Path/Pushbutton
Code group	Displaying usage for other code group	<i>Dynamic modification rule</i> → <i>Other code group</i>

Code

Code

Definition

Codes describe qualitative contents in machine form that can be easily processed.

Use

Codes make up the lowest level of a catalog. They can describe, for example, a characteristic attribute, a defect type, a defect location or a usage decision.

The code is distinctive in conjunction with the catalog and code group:

Catalog	Code Group	Code
Characteristic attributes	Color	Red
		Blue
		Yellow
		Green

Integration

- A code is always assigned to a [code group \[Page 11\]](#).
- You can assign a code to one or several [selected sets \[Page 19\]](#).
- When the catalog entry code is first used, a usage indicator is set. This prevents this object from being accidentally deleted.

Creating and Editing Codes

Prerequisites

You have already created code groups for the required catalog type.

Procedure

1. On the code group overview screen, select the required code group and choose *Codes*.



This function allows you to simultaneously edit all codes in a code group. The system then locks this code group for other users.

2. On the overview screen for editing codes, proceed as follows, depending on whether you want to create or change a code:

	Creating a Code	Changing a Code
a)	<p>Choose <i>New entries</i></p> <p>The code group table is ready for input.</p>	<p>In the table, edit:</p> <ul style="list-style-type: none"> • Short text for the code • Long text for the code • Follow-up action (in the standard system, catalogs 2 and 3 only) • Defect class (when catalog 1 is valued with R (Rejected) and for catalog 9)
b)	<p>In the table, enter the following data:</p> <ul style="list-style-type: none"> • Key for the code • Short text for the code • Long text for the code (optional) • A valuation of the code (for catalog 1) for results recording • Follow-up action (in the standard system, catalogs 2 and 3 only) <p>Defect class (when catalog 1 is valued with R (Rejected) and for catalog 9)</p>	



Since the system sorts the codes in a code group alphanumerically, use leading zeros when entering codes. Otherwise the system sorts your codes as follows: 1, 10, 11, 12, 3, 4.

If you transport code groups for all clients, any long texts that exist are not included.

3. Choose *Save*.

Creating and Editing Codes

Additional Functions on the Overview Screen for Editing Codes

Function	Menu Path/ Pushbutton
Print standard list	<i>Table view → Print → Standard list</i>
Translation	<i>Edit → Translation</i>
Choose language for catalog	<i>Utilities → Choose languages</i>
Switch between display and change mode	<i>Change → Display pushbutton</i>
Copy code	<i>Copy as... pushbutton</i>
Delete code (only possible if the code is not being used in master or movement data)	<i>Delete pushbutton</i>
Print variable list	<i>Variable list pushbutton</i>
Create or change long text	<i>Long text pushbutton</i>
Display the use of codes in selected sets	<i>Use in selected set pushbutton</i>

Selected Set

Definition

A selected set contains a combination of different codes at plant level, for example, coded descriptions of characteristic attributes (such as color, shape, surface characteristics), defect causes or usage decisions from different code groups.

Use

You use selected sets to combine [codes \[Page 16\]](#) from several [code groups \[Page 11\]](#) for processing that are allowed or useful for a particular application.

Codes that are copied into a selected set are known as set codes.

When you maintain the selected set index, the system locks the required [catalog type \[Page 8\]](#) for other users. However, if you use the individual maintenance function, only the required selected set is locked.

Structure

Selected sets contain codes that were copied into selected sets as individual set codes, or as complete code groups.



The codes in the selected set *Powdered drink color* contain a limited number of colors that describe the foodstuff. The selected set *Paint color*, however, contains color codes that describe the paint color of a car. These codes are also contained in the code groups for "Red colors" and "Green colors".

Selected Set	Codes	From code group
Powdered drink color	Cherry red	Red colors
	Rust red	Red colors
	Light red	Red colors
	Orange-red	Red colors
Paint color	Fire-engine red	Red colors
	Orange-red	Red colors
	Olive green	Green colors
	Ocean green	Green colors

Integration

- A code group can contain numerous entries, for example, over 100 codes. You combine code groups into selected sets to reduce this quantity, or to organize the codes differently. You can select codes from different code groups within a catalog type.
- Selected sets from the catalog types *Characteristic attribute* and *Usage decision* also contain a valuation for each code, as additional information (*Accepted* or *Rejected*). Follow-up actions can be triggered directly from these codes.

Selected Set

When you copy a selected set or set code into the selected set to be processed, the valuation and the defect class (if available) are also copied. However, you can change the valuation and the defect class.

- Selected sets can be used in inspection plans or master inspection characteristics, depending on the processing status:

Status	Effects
<i>Being created</i>	You cannot use the selected set yet in the master inspection characteristic or inspection plan.
<i>Released</i>	You can use the selected set in other applications.
<i>Can no longer be used</i>	The selected set is not to be used in the future. It can, however, still be in use.
<i>Deletion flag</i>	In the deletion process, the system checks whether the selected set is being used. If there is no link to the selected set, then it is deleted. If there is a link, then you cannot delete the code group. When the catalog entry selected set is first used, a usage indicator is set. This prevents this object from being accidentally deleted.

Creating and Changing Selected Sets

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Catalog* → *Selected set* → *Edit*
2. Choose a catalog and a plant and enter a key for the selected set.



To display selected sets that have already been created, search using the generic entry (*). Qualify the generic entry as far as possible, to optimize the system performance, when searching.

If you enter a generic code group key, when creating or editing a selected set, the system locks all selected sets in the catalog for other users (otherwise it locks only one). If a catalog is already locked, then you can switch to the display mode by confirming the information prompt.

3. Choose *Create/change*.
4. On the overview screen for editing selected sets, proceed as follows, depending on whether you want to create or change a selected set:

	Creating a Selected Set	Changing a Selected Set
a)	Choose <i>New entries</i> The selected set table is ready for input.	In the table, edit: <ul style="list-style-type: none"> • Short text for the selected set • Status for the selected set • Long text for the selected set
b)	In the table, enter the following data: <ul style="list-style-type: none"> • Selected set key • Short text for the selected set • Status of the selected set • Long text for the selected set (optional) 	Choose Classification [Ext.] and enter data for the classification of the selected set (optional).
c)	Choose <i>Classification</i> and enter data for the classification of the selected set (optional).	



When you edit the status, the system checks your authorization.

In the change mode, the system only displays the selected sets that the user has authorization to change.

If you transport selected sets for all clients, any long texts that exist are not included.

5. Choose *Save*.

Creating and Changing Selected Sets**Additional Functions on the Overview Screen for Editing Selected Sets**

Function	Menu Path/ Pushbutton
Print list	<i>Table view → Print</i>
Switch between display and change mode	<i>Change → Display</i> pushbutton
Copy selected set (not for all plants, with long texts)	<i>Copy as...</i> pushbutton
Delete selected set (you can only delete selected sets that are not being used. The related set codes, classification data and the long text are also deleted)	<i>Delete</i> pushbutton
Create or change long text	<i>Long text</i> pushbutton

Creating and Changing Set Codes

Prerequisites

You have already created selected sets for the required catalog type.

Procedure

1. On the selected set overview screen, select the required selected set and choose *Set codes*.



This function allows you to simultaneously edit all set codes in a selected set. The system then locks this selected set for other users.

2. On the overview screen for editing set codes, proceed as follows, depending on whether you want to create or change a code:

	Creating a Set Code	Changing a Set Code
a)	<p>Choose <i>New entries</i></p> <p>The set code table is ready for input.</p>	<p>In the table, edit:</p> <ul style="list-style-type: none"> • The defect class (for catalog 9 only) • A valuation of the code (for catalogs 1 and 3) • Defect class (when catalog 1 is valued with R (Rejected) and for catalog 9) • Quality score (for catalog 3) • Follow-up action (in the standard system, catalogs 2 and 3 only) • Proposal for the stock posting (for catalog 3) • Key for the stock posting (for catalog 3) • Short text for the set code

Creating and Changing Set Codes

b)	In the table, enter the following data: <ul style="list-style-type: none"> • Code group key • Key for the code • A valuation of the code (for catalogs 1 and 3) • Defect class (when catalog 1 is valuated with R (Rejected) and for catalog 9) • Quality score (for catalog 3) • Follow-up action (in the standard system, catalogs 2 and 3 only) • Proposal for the stock posting (for catalog 3) • Key for the quantity posting (for catalog 3) • Short text for the set code 	
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If you transport selected sets for all clients, any long texts that exist are not included.

3. Choose Save.

Additional Functions on the Overview Screen for Editing Set Codes

Function	Menu Path/ Pushbutton
Print list	<i>Table view</i> → <i>Print</i>
Switch between display and change mode	<i>Change</i> → <i>Display</i> pushbutton
Create new set code	<i>New entries</i> pushbutton
Copy set code	<i>Copy as...</i> pushbutton
Delete set code (you can only delete the set code, if it is not included in a selected set)	<i>Delete</i> pushbutton
Create or change long text	<i>Long text</i> pushbutton
Display the use of set codes in selected sets	<i>Use of selected sets</i> pushbutton
Select code groups/codes (only when creating new entries); Entries are included in input help.	<i>Code groups/Codes</i> pushbutton
Choose selected sets (only when creating new entries)	<i>Selected sets/Set codes</i> pushbutton

Displaying Selected Sets and the Code Group Index

Displaying Selected Sets and the Code Group Index

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data*.
 - *Catalog* → *Code group* → *Index* or
 - *Catalog* → *Selected set* → *Index*.

2. On the selection screen, enter the following data:

Code Group Index	Selected Set Index	System Setting
Catalog type(s)	Catalog type(s)	*
Code group(s)	Plant(s)	*
Language key	Language key	Logon language
	Selected set(s)	



If you use these entries, the system selects all the catalogs and plants in the logon language.

You can overwrite the selection criteria proposed by the system.

3. Choose *Index*.

The system displays a list of all the code groups or selected sets that match your selection criteria.

Additional Functions in the Index Display

Index	Function	Menu Path/ Pushbutton	
Code group	Display details of code group	<i>Detail...</i> pushbutton	
	Display long text for code group	<i>Display long text</i> pushbutton	
	Print index	<i>Print</i> pushbutton	
	Display codes in the code group	<i>Explode line</i> pushbutton	
	Display details for the code	<i>Detail...</i> pushbutton on the detail screen	
	Display codes in the code group	<i>Detail...</i> pushbutton on the detail screen	
	Selected sets	Display details of selected set	<i>Detail...</i> pushbutton
		Print index	<i>Print</i> pushbutton
	Display long text for selected set	<i>Display long text</i> pushbutton	
	Display set codes of the selected set	<i>Explode line</i> pushbutton	
	Display details for the set code	<i>Detail...</i> pushbutton on the detail screen	

Displaying Selected Sets and the Code Group Index

	Display set codes of the selected set	<i>Detail...</i> pushbutton on the detail screen
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Distribution of Code Groups and Codes Using ALE

Use

The QM application component enables you to extensively automate the processing of catalogs (code groups and codes) for all systems. You can either trigger the distribution manually or automatically (depending on the settings in Customizing).

Integration

The distribution function for the code groups and codes is integrated in the general functions for the ALE processing of master data in the SAP System.

Since IDocs for links between catalogs and the classification system are also created and sent when code groups and codes are distributed using ALE, you should note that the following objects are also sent to target systems and IDocs must be posted there:

- IDocs from Quality Management that contain the links
- The affected classes from the classification system



If change documents are written when changes are made in the classification system and the automatic distribution of data using ALE is defined for these change documents, IDocs (containing the link from catalogs and classes) with the same content can be distributed several times to target systems. However, this does not have any negative effects on the target systems (for example, on performance).

Prerequisites

- You must have made the relevant settings in Customizing.
- If you want to distribute master inspection characteristics to target systems using ALE, you should perform an ALE distribution for code groups and codes beforehand. Otherwise, errors can occur during the distribution of master inspection characteristics, if they are assigned to code groups and codes that were not yet distributed to target systems.

Features

1. The SAP System reads the manually selected data from the database of the source system and creates an IDoc for each code group and the codes in it.
2. The IDoc is sent to the target systems that you have specified or maintained in the distribution model.
3. In the target system, the data from the IDoc is written to the application tables in the SAP System after various checks have been carried out.



- The checks that are made are similar to those that take place when a code group is created manually.

Distribution of Code Groups and Codes Using ALE

- During transmission, **all** data in the target system is overwritten. This only applies if none of the code groups, which should be deleted in the target system, are already in use. If a code group is already in use, the system cancels the posting of the IDoc in the target system, the data is not saved in the target system, a message is created, and if necessary, a workflow is triggered.
- 4. If an error occurs or a message is issued during one of the checks, this is documented in the ALE tool. If errors occur, processing is canceled and the data is not saved in the target system.

If the error, which causes the posting of the IDoc to be canceled (for example, if the affected object is locked by a user), can be eliminated in the target system, you can manually trigger the posting in the target system again.

- 5. In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

Sending Code Groups and Codes

Use

You use this function to manually distribute catalogs (code groups and codes) to (several) target systems



Since IDocs for links between catalogs and the classification system are also created and sent when catalogs are distributed using ALE, you should note that the following objects are also sent to target systems:

- IDocs from Quality Management that contain the links
- The affected classes from the classification system



If change documents are written when changes are made in the classification system and the automatic distribution of data using ALE is defined for these change documents, IDocs (containing the link from catalogs and classes) with the same content can be distributed several times to target systems. However, this does not have any negative effects on the target systems (for example, on performance).

Prerequisites

- You must have made the relevant settings in Customizing.
- If you want to distribute master inspection characteristics to target systems using ALE, you should perform an ALE distribution for code groups and codes beforehand. Otherwise, errors can occur during the distribution of master inspection characteristics, if they are assigned to code groups that were not yet distributed to target systems.

Procedure

1. Choose *Tools* → *ALE* → *Master data distribution* → *Logistics* → *Quality management* → *Code group* → *Send*.
2. On the initial screen, enter the catalog types and/or code groups that should be sent.
3. Enter the logical target system, if you do not want the target system(s) to be taken from the distribution model (in Customizing).



You can enter each target system that is maintained as a logical system. If you did not enter a target system, the data is sent to **the** target systems that were entered in the distribution model.

4. Choose *Execute*.

The system reads the selected data from the database of the source system and writes it to one or more IDocs.

Sending Code Groups and Codes



One IDoc is created for each code group.

5. In the target system, choose *Tools* → *ALE* → *ALE administration* → *Services* → *Manually process IDocs*.
6. From the list, select the IDocs to be transferred and choose *Process*.



You can automate processing. This means that the posting of the IDocs occurs immediately and does not have to be triggered manually.

7. Enter the IDoc number in the target system and choose *Execute*.

Result

- After running various checks, the system writes the code groups and codes to the application tables in the target system.
- If an error occurs or a message is issued during one of the checks, this is documented in the ALE tool. If errors occur, processing is canceled and the data is not saved in the target system.

If the error, which causes the posting of the IDoc to be canceled (for example, if the affected object is locked by a user), can be eliminated in the target system, you can manually trigger the posting in the target system again.

- In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

Inspection Characteristic (QM-PT-BD-ICH)

Purpose

You use inspection characteristics to describe the inspection criteria for materials, parts, and products. You can create master inspection characteristics at the plant level to simplify and standardize the inspection planning activities and to standardize the nomenclature. This allows you to plan inspections systematically, uniformly, and economically.

Implementation Considerations

You need the *Inspection Characteristics* component to plan inspections in which you store characteristic-based inspection specifications in the material specifications or inspection plans.

In addition to the inspection plans in the *Quality Management* (QM) component, you also use the following task list types:

- Routings (PP)
- Rate routings (PP)
- Master recipes (PP-PI)
- Maintenance task lists (PM)

Integration

Inspection characteristics are used in:

- **Task lists**

When you create a task list, you can specify master inspection characteristics and you can also create inspection characteristics in the task list. In a task list, you can reference [master inspection characteristics \[Page 34\]](#), or include them as complete or incomplete copy models. Only master inspection characteristics support a multiple-language requirement.

- **Material specifications**

In material specifications, you can use a master inspection characteristic with or without a reference to a class characteristic from a [batch class \[Ext.\]](#).

Master inspection characteristics, in turn, can also reference inspection methods and catalogs.

Features

Using the *Inspection Characteristics* component, you can:

- Describe the inspection criteria for materials, parts, and products
- Define the qualifications for inspectors
- Manage master inspection characteristics as master records independently of a task list, edit the master inspection characteristics centrally, and use the same master record numerous times in different task lists
- Use master inspection characteristics as copy models in the task lists

Inspection Characteristic (QM-PT-BD-ICH)

- Reference master inspection characteristics in task lists or material specifications. You can subsequently delete these references if necessary. If you created the master inspection characteristic as a complete copy model, the reference is automatically deleted when the characteristic is included.



Every change you make to a master inspection characteristic that is referenced in a task list is also reflected in the task list (provided you make the change without history).

- Create a where-used list to determine the task lists, material specifications and certificate profiles, in which a master inspection characteristic is used.



If you use a master inspection characteristic in a task list, material specification or a certificate profile, the system automatically sets a usage indicator so you cannot inadvertently delete the master inspection characteristic.

- Search for and replace master inspection characteristics in inspection plans and material specifications (you can only replace referenced master inspection characteristics).
- Make changes to master inspection characteristics with or without history. You specify the required plant-specific default value for this function in the [Customizing \[Ext.\]](#) application. A version management function ensures that all changes are documented.
- Create [different versions \[Page 151\]](#) of a master inspection characteristic (for example, with different validity periods)
- Find the desired version of a master inspection characteristic with different validity periods by specifying the key date
- Classify master inspection characteristics
- Assign inspection methods to master inspection characteristics



You can assign several inspection methods to a master inspection characteristic; however, you can only assign one [inspection method \[Page 59\]](#) to an inspection characteristic in a task list.

- Define inspection characteristics as qualitative (for example, “product color”) or quantitative characteristics (for example, “material density”).
- Define inspection characteristics as [calculated characteristics \[Ext.\]](#) that is, as quantitative inspection characteristics, whose values are calculated from the inspection results of other characteristics (calculation input characteristics), according to a predefined formula.
- Create dependencies between different inspection characteristics in an inspection operation for dynamic modification of the inspection scope. Dynamic modification of the [dependent characteristic \[Ext.\]](#) takes place based on the dynamic modification of the leading characteristic.
- Define an inspection characteristic as a leading characteristic, that is, as a required characteristic, to which conditional characteristics are assigned in the operation of a task list.

Inspection Characteristic (QM-PT-BD-ICH)

Conditional characteristics are inspected, depending on the valuation of this leading characteristic.

- Set control indicators to specify the characteristic attributes
- Define tolerance keys for quantitative characteristics
- Use master inspection characteristics for inspection specifications and for the transfer of inspection results to the batch specification (provided you have maintained class characteristics and batch classes)

Constraints

If you want to reference other master records from master inspection characteristics, you must have already created the corresponding master records.

Master Inspection Characteristic

Master Inspection Characteristic

Definition

An inspection characteristic that is created as a master record. This characteristic is intended for frequent use in inspection plans or for evaluation purposes across all inspection plans. Master inspection characteristics are language-independent.

Use

You use master inspection characteristics in inspection plans, material specifications, and certificate profiles to simplify and standardize data entry.

Structure

A master inspection characteristic can contain general data and control data.

- **General Data:**
 - Name of the master inspection characteristic
 - Plant
 - Reference to class characteristic
 - Status
 - Language key
 - Details of other languages
 - Short texts for the master inspection characteristic
 - Long texts for the master inspection characteristic
 - Classification of master inspection characteristics
 - Assigned inspection methods
 - Assigned catalogs
 - Search field
- **Control Data:**
 - Whether the master inspection characteristic is a qualitative or quantitative characteristic
 - Sample details (such as sampling procedure, SPC characteristic, additive sample, destructive sample)
 - Information for results confirmation (for example, summarized recording, recording by class, required or optional characteristic, conditional characteristic - this means that the inspection of this characteristic is dependent on either the acceptance or rejection of the previous required characteristic)
 - Type of values to be inspected for quantitative characteristics (for example, target value, lower specification limit, upper specification limit)
 - Inspection of characteristic attributes for qualitative characteristics

Master Inspection Characteristic

- Details of inspection scope
- Details of documentation in the results recording function
- Other information (such as assignment of test equipment, characteristic for long-term inspection, measured values, calculated characteristic, printing options)

Integration

- Use master inspection characteristics in inspection plans, material specifications, and certificate profiles
- Link master inspection characteristics to class characteristics
- Store sample-drawing texts in master inspection characteristics
- Assign inspection methods to master inspection characteristics
- Assign selected sets and code groups to master inspection characteristics

Creating or Changing a Master Inspection Characteristic

Creating or Changing a Master Inspection Characteristic

Prerequisites

If you want to change a master inspection characteristic with history, you must have set the relevant indicator in [Customizing \[Ext.\]](#).

Procedure

1. Proceed as follows:

To...	Choose	On the initial screen, enter the following data:
Create a new master inspection characteristic	<i>Logistics → Quality management → Quality planning → Basic data → Inspection characteristic → Create</i>	<ul style="list-style-type: none"> • Plant • Name of the master inspection characteristic (optional) • Valid from • Name of a class characteristic (optional) • Reference data (optional)
Create a new validity period (version) for an existing master inspection characteristic	<i>Logistics → Quality management → Quality planning → Basic data → Inspection characteristic → Create version</i>	<ul style="list-style-type: none"> • Plant • Name of the master inspection characteristic • Valid from • Reference data (optional)
Change an existing master inspection characteristic	<i>Logistics → Quality management → Quality planning → Basic data → Inspection characteristic → Change</i>	<ul style="list-style-type: none"> • Plant • Name of the master inspection characteristic • Key date
Display an existing master inspection characteristic	<i>Logistics → Quality management → Quality planning → Basic data → Inspection characteristic → Display</i>	<ul style="list-style-type: none"> • Plant • Name of the master inspection characteristic • Key date • Version of the master inspection characteristic to be displayed

2. Choose *Master inspection characteristic*.

The general data screen for the master inspection characteristic appears.

Creating or Changing a Master Inspection Characteristic

- When creating a master inspection characteristic, define the characteristic type (quantitative or qualitative characteristic), or in the *Preset indicators* field, enter a control key that has already been defined in [Customizing \[Ext.\]](#).



You cannot change the characteristic type if you:

- Change the master inspection characteristic without history and the master inspection characteristic is linked to a class characteristic
 - Change the master inspection characteristic without history and the master inspection characteristic is referenced in a task list or in a material specification
 - Use a control key, for which the *Indicator fixed* indicator has been set.
- Enter a short text, a long text, if required, and a search field, set the necessary status, and choose the *Control indicators*.

The system displays different dialog boxes for editing the [control indicators \[Page 55\]](#) for the master inspection characteristic, depending on the characteristic type that you have previously defined.

- Edit the control indicators and choose *Continue*.

The general data screen for the master inspection characteristic reappears.

- If necessary, enter the following additional information:

- Internal characteristic ID
In this field, you can enter an additional characteristic description. This description identifies a characteristic during the electronic exchange of characteristic values.
- Authorization group
- [Inspector qualification \[Page 83\]](#)
- Share calculation
- Characteristic importance
- Info fields (purely informative data for the master inspection characteristic)
- [Quantitative data \[Page 58\]](#) (for example target value, plausibility limits, specification limits)



In the screen area *Administrative data*, the validity of the master inspection characteristic, the creator, creation date, and, if available, the person who made the changes and the change date.

- Save your data.



If you change a master inspection characteristic that is referenced in a task list and you have made this change [without history \[Page 148\]](#), the change is also included in the task list, since the system does not create a new [master inspection characteristic version \[Page 151\]](#) in the change procedure.

Creating or Changing a Master Inspection Characteristic

However, if you change the master inspection characteristic with history, the system creates a new version with the same validity period. In this case, the changes are not included in the task list, since this contains the old version of the master inspection characteristic.

You can make settings in [Customizing \[Ext.\]](#) at client level, to trigger the replacement function automatically, when a master inspection characteristic is saved.

Additional Functions on the General Data Screen for the Master Inspection Characteristic

Function	Menu Path/ Pushbutton	What You Should Know
Displaying the time line	<i>Time line</i> pushbutton	You can display a list of all valid versions of the master inspection characteristic (in chronological order, according to validity). From the list, you can display the version you require.
Displaying the field history	<i>Field history</i> pushbutton	You can display the change history for a field. If you made changes to a master record without history , the system displays only the current entry in the field. If, however, you made the changes with history , the system lists all changes with the name of the user who changed the field, the date the field was changed, and all the previous values of the field.
Creating/changing the long text	<i>Create/change long text</i> pushbutton	You can create or change a long text for the master inspection characteristic.
Editing other languages	<i>Other languages</i> pushbutton	You can create, change or display the short text for the master inspection characteristic in other languages.
Editing the sample-drawing text	<i>SampDraw text</i> pushbutton	You can create, change or display a sample-drawing text for the master inspection characteristic in several languages.
Editing quantitative data [Page 58]	<i>Quant. data</i> pushbutton	You can create, change or display additional quantitative data.
Editing the classification	<i>Classification</i> pushbutton	You can classify [Ext.] master inspection characteristics, to systematically define, search for and re-use master inspection characteristics.
Assigning inspection methods [Page 59]	<i>Inspection methods</i> pushbutton	You can assign inspection methods to the master inspection characteristic.
Assigning catalogs [Page 61]	<i>Catalogs</i> pushbutton	You can assign code groups or selected sets to the master inspection characteristic

Creating or Changing a Master Inspection Characteristic

<p>Completion check</p>	<p>List field</p>	<p>If you choose the option <i>Complete copy model</i> or <i>Reference characteristic</i>, the system checks whether the master inspection characteristic has been fully maintained. The data that you must enter depends on the control indicator for the master inspection characteristic.</p> <p>You can copy or create a reference to a reference characteristic. You can only copy a complete copy model. An <i>incomplete copy model</i> can only be copied into a task list.</p> <p>For master inspection characteristics that are linked to a class characteristic, the system automatically sets the entry <i>Reference characteristic</i>, which cannot be changed.</p>
<p>Displaying a class characteristic</p>	<p><i>Environment</i> → <i>Display class characteristic</i></p>	<p>You can display the data for a class characteristic that is linked to the master inspection characteristic.</p>
<p>Displaying a material specification</p>	<p><i>Environment</i> → <i>Material specification usage</i></p>	<p>You can display a list of all material specifications that use the master inspection characteristic. From this list, you can display data in individual material specifications.</p>
<p>Displaying certificate profile</p>	<p><i>Environment</i> → <i>Certificate profile usage</i></p>	<p>You can display a list of all certificate profiles that use the master inspection characteristic. From this list, you can display individual certificate profiles.</p>

Link: Master Inspection Characteristic – Class Characteristic

Link: Master Inspection Characteristic – Class Characteristic

Use

The link between master inspection characteristics and class characteristics enables the automatic transfer of inspection results to the batch classification, provided that you inspect with a material specification or task list. The class characteristics from the batch class are automatically valuated at inspection completion, on the basis of the inspection results.

Integration

- You can only change the assignment of the class characteristic in the transaction for changing the master inspection characteristic, if the master inspection characteristic is not being used in any material specification, or if you make the change with history.
- [Inspection lot creation \[Page 44\]](#)

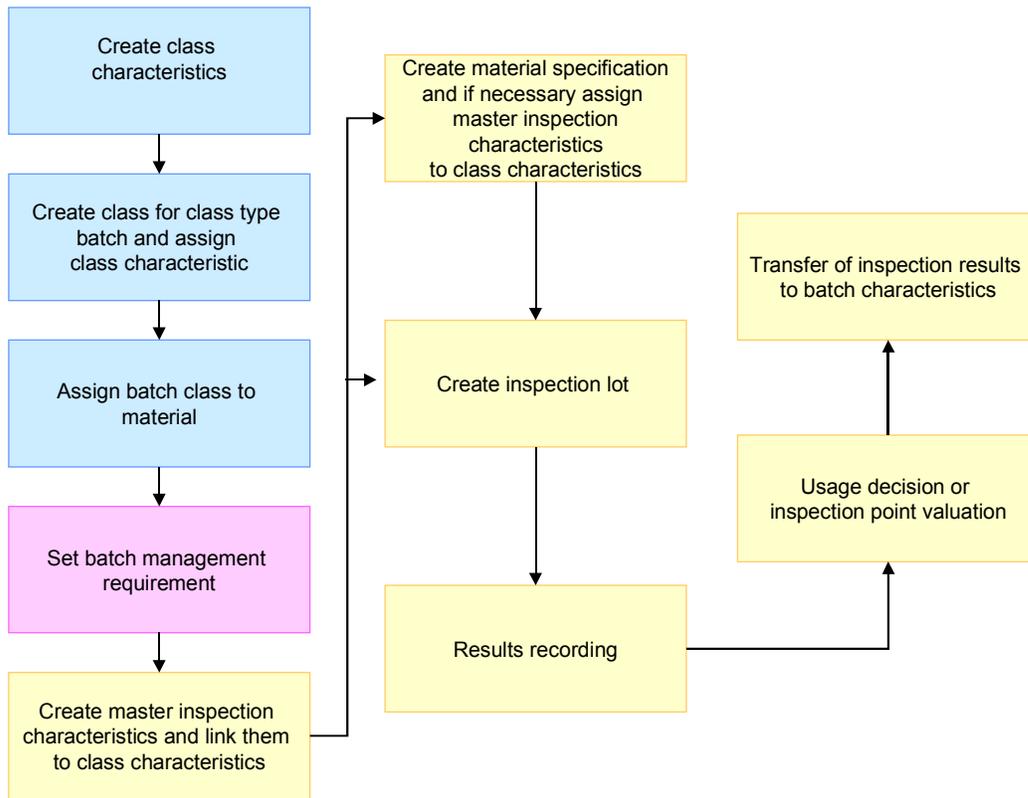
When you enter a class characteristic and link it to a master inspection characteristic, certain control indicators and values from this class characteristic are transferred to the master inspection characteristic. The data that is affected depends on whether the class characteristic is of the type " **NUM** " or " **CHAR** ": The inspection specifications from the master inspection characteristic are then overwritten by the inspection specifications from the Classification, if you inspect with a material specification and if the master inspection characteristic is assigned to the class characteristic in this material specification.
- [Batch valuation: \[Page 47\]](#)

The link between master inspection characteristics and class characteristics allows you to transfer results of a quality inspection to the batch classification, so that the system can access them in batch determination. This can only take place, if the material is to be handled in batches and if a batch class was assigned to the material master in the classification view.
- [Variant configuration: \[Page 50\]](#)

If a master inspection characteristic is linked to a class characteristic and a configuration is required for the production of goods (variant configuration), the inspection specifications from the variant configuration have precedence over the inspection specifications from the master inspection characteristic.
- [Batch determination: \[Page 52\]](#)

If a master inspection characteristic is linked to a class characteristic and a configuration is required for the production of goods (variant configuration), the inspection specifications from the variant configuration have precedence over the inspection specifications from the master inspection characteristic.

Link: Master Inspection Characteristic – Class Characteristic



The processes contained in the blue boxes take place in the *Classification System*; those in the yellow boxes take place in the *Quality Management* application; the processes in the pink boxes take place in the *material master*.

Prerequisites

- When you change a master inspection characteristic, if you want to create a link to a class characteristic with the format “NUM”:

 - The master inspection characteristic must be quantitative
 - The unit of measurement for the master inspection characteristic must match that for the class characteristic.
 - In the master inspection characteristic, the control indicators for the upper or lower specification limit (or both) must be set.
 - The interval limits of the class characteristic must be entered to correspond with the control indicators for the specification limit of the master inspection characteristic:

Specification Limits of the Master Inspection Characteristic	Interval Limits of the Class Characteristic
Lower specification limit only	Lower limit, no upper limit
Upper specification limit only	Upper limit, no lower limit
Both specification limits	Both upper and lower limit

Link: Master Inspection Characteristic – Class Characteristic

- When you change a master inspection characteristic, if you want to create a link to a class characteristic with the format “**CHAR**”:
 - The master inspection characteristic must be qualitative.
 - In the master inspection characteristic, the control indicator for characteristic attributes must be set.
 - A selected set of catalog type **1** must be assigned to the class characteristic.

Features

- You can only have a 1:1 relationship between a class characteristic and a master inspection characteristic (that is, you **cannot** reference the same class characteristic in several master inspection characteristics).
- If you create a link from an existing master inspection characteristic to a class characteristic with the format “**NUM**”, the system automatically makes the following changes:
 - The *Quantitative charac.* indicator is set.
 - The master inspection characteristic is marked as a reference characteristic.
 - For the results confirmation, the *Summarized recording* indicator is set. If the control indicator was previously set for *Classed recording*, all relevant data (for example, class width) is initialized.
 - The control indicator *Check target value* is canceled.
 - The *Confirm values* indicator is set (class characteristics with the format “**NUM**” can only be valuated using numerical values).
 - If the *Entry required* indicator is set in the class characteristic, the master inspection characteristic is a required characteristic, otherwise, it is an optional characteristic.



When you maintain general characteristics in the Classification system, you must set the *Interval vals allowed* indicator, so that an interval can be entered in the configuration. If you valuate a class characteristic in the configuration over several intervals (for example, intervals 1-2m and 5-6m for the characteristic “length”, the system copies either one of these intervals, when the inspection lot is created. To avoid this scenario, you should not valuate a characteristic with several intervals.

- The number of decimal places is taken from the class characteristic as a proposed value.
- All pairs of limits (except the tolerance limits) are initialized.
- Default values for the upper and lower specification limit are taken from the interval limits of the class characteristic. (For an inspection with a material specification, the values entered in the class characteristic are used if the master inspection characteristic in the material specification is linked to the class characteristic). However, for an inspection with a task list, the values specified in the task list for this master inspection characteristic are relevant.
- The short texts are taken from the class characteristics and proposed as default texts.

Link: Master Inspection Characteristic – Class Characteristic

- In addition to the short text, the search field is also taken from the class characteristic and proposed in the logon language as the default.
- If you create a link from an existing master inspection characteristic to a class characteristic with the format “**CHAR**”, the system automatically makes the following changes:
 - The *Qualitative charac.* indicator is set.
 - You must completely maintain master inspection characteristics that are linked to a class characteristic (master inspection characteristic is marked as *Reference characteristic* or *Complete copy model*).
 - If you make this link to use the batch classification, you must set the *Summ. recording* control indicator, so that classification can take place.
 - The control indicator *Charac. attribute* can no longer be changed.
 - The selected set from catalog type 1 that is defined in the class characteristic is assigned to the master inspection characteristic.
 - If method-dependent selected sets from catalog type 1 are assigned to the master inspection characteristic, they are canceled.
 - If the *Entry required* indicator is set in the class characteristic, the master inspection characteristic is a required characteristic, otherwise, it is an optional characteristic.
 - The short text is taken from the class characteristic and proposed as the default text.
 - In addition to the short text, the search field is also taken from the class characteristic and proposed in the logon language as the default.

See also:

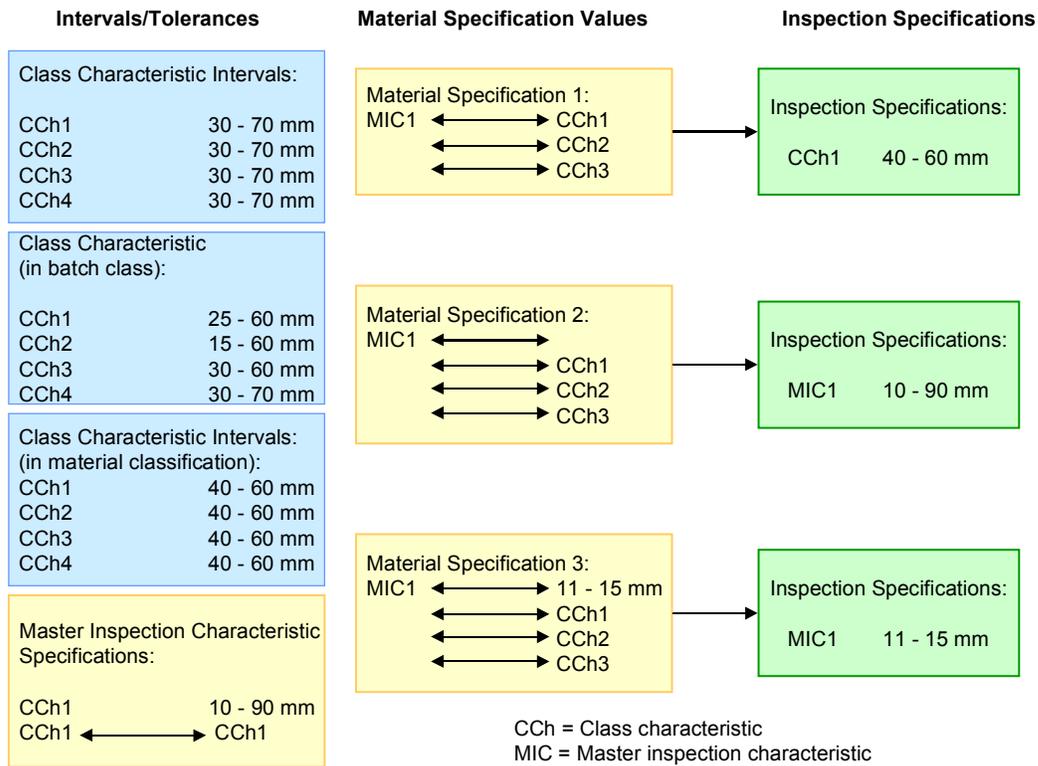
[The Classification System \[Ext.\]](#)

Effects of the Link at Inspection Lot Creation

Effects of the Link at Inspection Lot Creation

Integration

When you enter a class characteristic and link it to a master inspection characteristic, certain control indicators and values from this class characteristic are transferred to the master inspection characteristic. The data that is affected depends on whether the class characteristic is of the type " NUM " or " CHAR ": The inspection specifications from the master inspection characteristic are then overwritten by the inspection specifications from the Classification, if you inspect with a material specification and if the master inspection characteristic is assigned to the class characteristic in this material specification.



The blue boxes illustrate processes that take place in the *Classification System*; the yellow boxes illustrate those in the *Quality Management* application; the green boxes illustrate those at inspection lot creation.

Process Flow

1. In the Classification System, you create the class characteristics CCh1, CCh2, CCh3 and CCh4 and define intervals for these class characteristics.

Class Characteristic	Intervals
CCh1	30 - 70 mm
CCh2	30 - 70 mm
CCh3	30 - 70 mm
CCh4	30 - 70 mm

2. In the classification function, you create a batch class B1 and assign the class characteristics CCh1, CCh2, CCh3 and CCh4 to this batch class. You can change the intervals at this point.

Class Characteristic in Batch Class Ch	Intervals
CCh1	25 - 70 mm
CCh2	15 - 70 mm
CCh3	30 - 70 mm
CCh4	30 - 70 mm

3. In the classification view of the material master, you assign the batch class Ch to the material MAT1. You can change the intervals again at this point.

Class Characteristic in Batch Class Ch	Intervals
Material 1	CCh1 40 - 60 mm
	CCh2 40 - 60 mm
	CCh3 40 - 60 mm
	CCh4 40 - 60 mm

4. In the material master, you set the batch management requirement indicator.
 5. In the *Quality Management* application component, you create the master inspection characteristic MIC1 and link it to the class characteristic CCh1.

Master Inspection Characteristic	Inspection Specifications	Linked Class Characteristic
MIC1	10 - 90 mm	CCh1

6. You create a material specification for material 1.

a. Material specification 1

In the [material specification \[Ext.\]](#) the master inspection characteristic MIC1 is assigned to the class characteristic CCh1. In addition, the material specification contains the class characteristics CCh2 and CCh3, which have no master inspection characteristics assigned to them.

b. Material specification 2

In the material specification, the master inspection characteristic MIC1 is not assigned to any class characteristic. In addition, the material specification contains the class characteristics CCh1, CCh2 and CCh3, which have no master inspection characteristics assigned to them.

c. Material specification 3

In the material specification, the master inspection characteristic MIC1 is not assigned to any class characteristic. However, the master inspection characteristic MIC1 was unlocked and the inspection specification 11 - 15 mm was specified. In addition, the material specification contains the class characteristics CCh1, CCh2 and CCh3, which have no master inspection characteristics assigned to them.

7. In the [inspection setup \[Page 127\]](#) in the Quality Management view of the material master, set the *Insp. with mat. spec.* indicator.

Result

When an inspection takes place, the system accesses the inspection specifications in the following sequence:

1. Inspection with material specification 1

When the inspection lot is created, the inspection specifications from CCh1 for material 1 (40 - 60 mm) are used for the inspection. If no inspection specifications have been entered for the material, the inspection specifications for the batch class Ch are used. If there are no inspection specifications for the batch class, the system takes the inspection specifications from the class characteristic. Class characteristics CCh2 and CCh3 are not inspected.

2. Inspection with material specification 2

When the inspection lot is created, the inspection specifications from MIC1 (10 –90 mm) are used for the inspection. Class characteristics CCh1, CCh2 and CCh3 are not inspected.

3. Inspection with material specification 3

When the inspection lot is created, the inspection specifications from the unlocked MIC1 (11 – 15 mm) are used for the inspection. Class characteristics CCh1, CCh2 and CCh3 are not inspected.

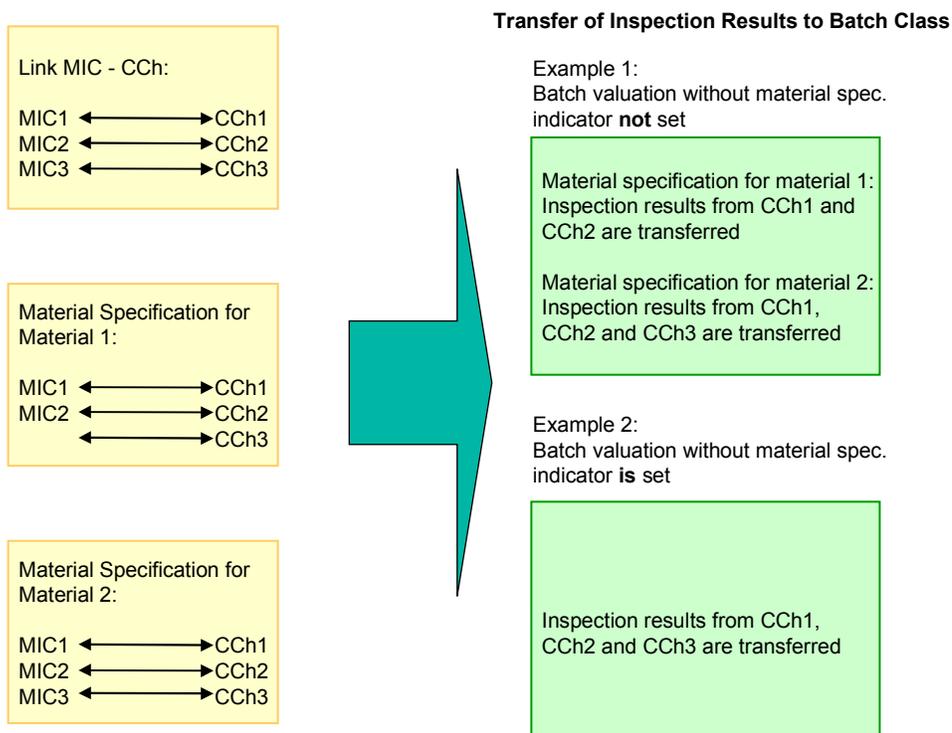


If you do not set the *Insp. with mat. spec.* indicator in the inspection setup (Quality Management view of material master), the system uses the inspection specifications from the class characteristic that is linked to the master inspection characteristic for the inspection.

Effects of the Link at Batch Valuation

Integration

The link between master inspection characteristics and class characteristics allows you to transfer results of a quality inspection to the batch classification, so that the system can access them in batch determination. This can only take place, if the material is to be handled in batches and if a batch class was assigned to the material master in the classification view.



The processes shown in yellow take place in the *Quality Management* application component; those shown in green take place at inspection lot creation.

Process Flow

Example 1

1. In [Customizing \[Ext.\]](#) at plant level, you **do not** set the *Batch valuation without material spec.* indicator.
2. You create the class characteristics CCh1, CCh2 and CCh3.
3. You create the master inspection characteristics MIC1, MIC2 and MIC3 and link these to the class characteristics CCh1, CCh2 and CCh3 as follows:

Master Inspection Characteristic	Class Characteristic
MIC1	CCh1
MIC2	CCh2
MIC3	CCh3

4. You create material specifications 1 and 2 that must be available with the following data, when the inspection point is valuated, or when the usage decision is made:

a. **Material specification 1**

Class Characteristic	Assigned Master Inspection Characteristic
CCh1	MIC1
CCh2	MIC2
CCh3	

b. **Material specification 2**

Class Characteristic	Assigned Master Inspection Characteristic
CCh1	MIC1
CCh2	MIC2
CCh3	MIC3

Example 2

1. In Customizing at plant level, you **set** the *Batch valuation without material spec.* indicator.
2. You create the class characteristics CCh1, CCh2 and CCh3.
3. You create the master inspection characteristics MIC1, MIC2 and MIC3 and link these to the class characteristics CCh1, CCh2 and CCh3 as follows:

Master Inspection Characteristic	Class Characteristic
MIC1	CCh1
MIC2	CCh2
MIC3	CCh3

Result

Example 1

If you inspect with material specification 1, the inspection results from characteristics 1 and 2 are transferred to the batch classification and are used in batch determination. The inspection specifications are copied from the classification.

If you inspect with material specification 2, the inspection results from characteristics 1, 2 and 3 are transferred to the batch classification and are used in batch determination. The inspection specifications are copied from the classification.

Example 2

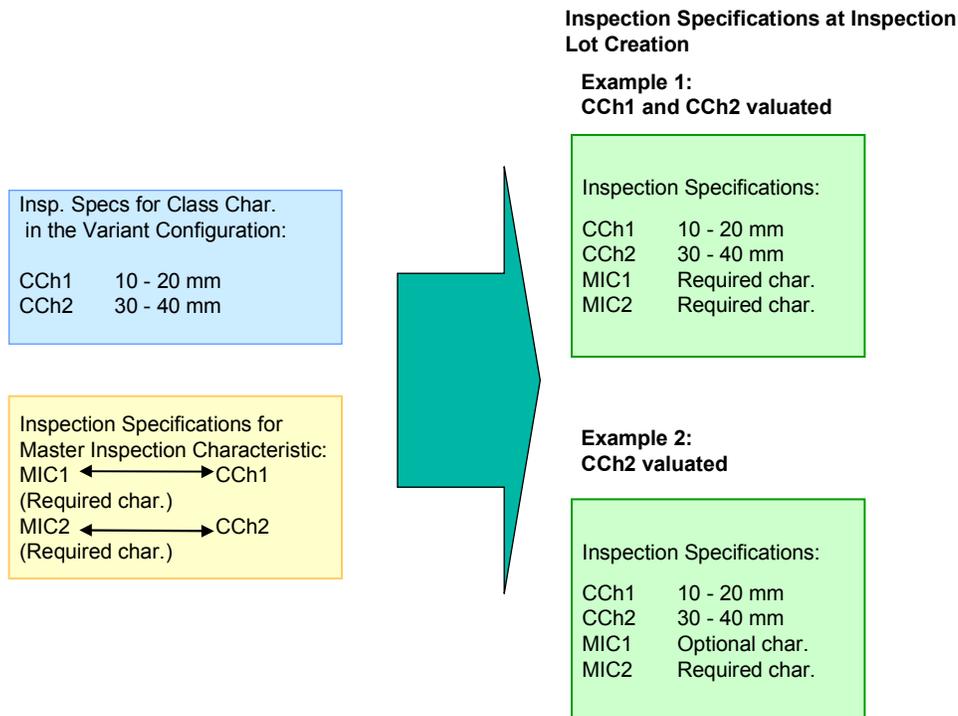
In the inspection, the inspection results from characteristics 1, 2 and 3 are transferred to the batch classification and are used in batch determination.

Effects of the Link in Variant Configuration

Effects of the Link in Variant Configuration

Integration

If a master inspection characteristic is linked to a class characteristic and a configuration is required for the production of goods (variant configuration), the inspection specifications from the variant configuration have precedence over the inspection specifications from the master inspection characteristic.



The blue box illustrates a process that takes place in the *Classification System*; the process illustrated in yellow takes place in the *Quality Management* application; those illustrated in green take place at inspection lot creation.

Process Flow

1. In the customer purchase order, you enter the inspection specifications for the class characteristics CCh1 and CCh2 that the customer has specified for the material (variant configuration):

Class Characteristic	Inspection Specifications
CCh1	10 - 20 mm
CCh2	30 - 40 mm

2. You create the master inspection characteristics MIC1 and MIC2 as required characteristics and link these with the class characteristics as follows:

Effects of the Link in Variant Configuration

Master Inspection Characteristic	Class Characteristic
MIC1	CCh1
MIC2	CCh2

3. In the [inspection setup \[Page 127\]](#) in the Quality Management view of the material master, you set the *Insp. by configuratn* indicator and either the *Insp. with mat spec.* or the *Insp. with task list.* indicator.
 - a. **Example 1**

The class characteristics CCh1, and CCh2 were valuated in the variant configuration.
 - b. **Example 2**

The class characteristic CCh2 was valuated in the variant configuration, but not CCh1.

Result

At the inspection, the settings listed above have the following effect:

1. Example 1

Since both class characteristics were valuated in the variant configuration, the planned required characteristics MIC1 and MIC2 remain required characteristics. The inspection specifications are copied from the variant configuration.



When the inspection specifications are determined, specifications from the variant configuration have precedence over those from the material specification. The specifications from the material specification have precedence over those from the task list.

2. Example 2

Since only the class characteristic CCh2 was valuated, the planned required characteristic MIC2 remains a required characteristic. Since CCh1 was not valuated, the planned required characteristic becomes an optional characteristic. The specifications for characteristic 2 are taken from the variant configuration, those for characteristic 1 from the master inspection characteristic.



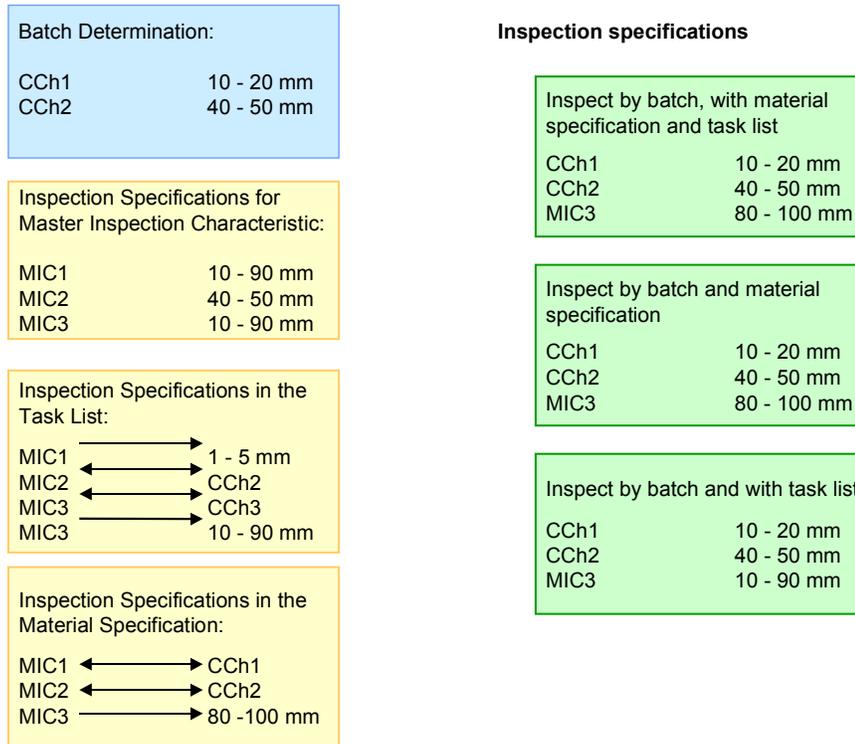
When the inspection specifications are determined, specifications from the variant configuration have precedence over those from the material specification. The specifications from the material specification have precedence over those from the task list.

Effects of the Link at Batch Determination

Effects of the Link at Batch Determination

Integration

If a master inspection characteristic is linked to a class characteristic and a configuration is required for the production of goods (variant configuration), the inspection specifications from the variant configuration have precedence over the inspection specifications from the master inspection characteristic.



The blue box illustrates the process that takes place in the *Classification System*; the yellow boxes illustrate those in the *Quality Management* application; the green boxes illustrate those at inspection lot creation.

Process Flow

- In batch determination, you define the class characteristics CCh1 and CCh2 with the following inspection specifications:

Class Characteristic	Inspection Specifications
CCh1	10 - 20 mm
CCh2	40 - 50 mm

- You create the master inspection characteristics MIC1, MIC2 and MIC3 and link these with the class characteristics as follows:

Effects of the Link at Batch Determination

Master Inspection Characteristic	Inspection Specifications	Class Characteristic
MIC1	30 -1.57 in	CCh1
MIC2	40 - 50 mm	CCh2
MIC3	10 -3.54 in	

- In the [inspection setup \[Page 127\]](#) in the Quality Management view of the material master, you set the *Insp. by batch* indicator and either the *Insp. with mat spec.* or the *Insp. with task list.* indicator.
- You create a task list with the master inspection characteristics MIC1 and MIC3 and a material specification with the master inspection characteristics MIC1 and MIC2, and change the inspection specifications of the master inspection characteristics as follows:

Master Inspection Characteristic	Inspection Specifications
MIC1 in the task list	1 - 5 mm
MIC3 in the task list	50 - 70 mm
MIC2 in the material specification	40 - 50 mm
MIC3 in the material specification	80 - 100 mm

Result

For an inspection, the system accesses the inspection specifications in the following sequence:

Indicator Set in Inspection Setup	Inspection Specifications
<i>Inspect by batch</i>	10 - 20 mm for MIC1 (from CCh1) 40 - 50 mm for MIC2 (from CCh2) 10 - 90 mm in for MIC3 (from CCh3)
<i>Inspect by batch</i> <i>Insp. with mat. spec.</i>	10 - 20 mm for MIC1 (from CCh1) 40 - 50 mm for MIC2 (from CCh2) 80 - 100 mm for MIC3 (from CCh3)
<i>Inspect by batch</i> <i>Inspect with task list</i>	10 - 20 mm for MIC1 (from CCh1) 40 - 50 mm for MIC2 (from CCh2) 50 -70 mm for MIC3 (from CCh3)
<i>Inspect by batch</i> <i>Insp. with mat. spec.</i> <i>Inspect with task list</i>	10 - 20 mm for MIC1 (from CCh1) 40 - 50 mm for MIC2 (from CCh2) 80 - 100 mm for MIC3 (from CCh3 mat. spec.)



When the inspection specifications are determined, specifications from the batch determination have precedence over those from the material specification. The specifications from the material specification have precedence over those from the task list.

Effects of the Link at Batch Determination

Control Indicators for the Inspection Characteristic

Use

You use control indicators for the inspection characteristic, to influence the further processing of the inspection characteristic. With this control indicator, you define, for example, the characteristic type, specification limits, the type of results recording and whether the inspection characteristic must be inspected.

Integration

Depending on which control indicators you set for the inspection characteristic, you can influence the type of results recording, defects recording, whether a [control chart \[Ext.\]](#) is to be run, the sample size and the documentation for the inspection results. The link between master inspection characteristics and class characteristics enables the automatic transfer of inspection results to the [batch classification \[Page 47\]](#), provided that you inspect with a material specification or task list. The class characteristics from the batch class are automatically valuated at inspection completion, on the basis of the inspection results.

Features

The following control indicators are available, depending on the characteristic type (quantitative or qualitative characteristic):

Characteristic Type	Indicator	What You Should Know
Quantitative	<i>Upper specif. limit</i> <i>Lower specif. limit</i> <i>Check target value</i>	You define, whether the target value lies within the tolerances and which limits are to be inspected. Depending on which indicators you have set, you can enter additional quantitative data [Page 58] and a tolerance key.
Quantitative	<i>Confirm values</i>	You define whether measured values are to be inspected and confirmed.
Quantitative	<i>Calculated charac.</i>	You define whether the inspection results are determined by the inspection of the inspection characteristic itself, or by other inspection characteristics within the same operation.
Quantitative/ qualitative	<i>Sampling procedure</i>	You define whether a sampling procedure must be assigned when the master inspection characteristic is used in the task list or in the material specification (optional for an inspection with a material specification).
Quantitative/ qualitative	<i>SPC characteristic</i>	You define whether a control chart is to be run.
Quantitative/ qualitative	<i>Additive sample</i>	When samples are calculated, you define whether the size of the partial sample is increased by the quantity that is required for the inspection of this characteristic.

Control Indicators for the Inspection Characteristic

Quantitative/ qualitative	<i>Destructive insp.</i>	You specify whether the sample is to be destroyed after inspection. This means that is no longer available. This quantity is used in the usage decision as the proposed quantity for the posting to sample.
Quantitative/ qualitative	<i>Summ. recording</i> <i>Single result</i> <i>No charac. recording</i> <i>Classed recording</i> <i>Defects recording</i>	You define the type of results recording for the master inspection characteristic.
Quantitative/ qualitative	<i>Required charac.</i> <i>Optional charac.</i> <i>After accept.</i> <i>After rejection</i>	You define whether the inspection characteristic must always be inspected, or whether it is only to be inspected under certain conditions.
Quantitative/ qualitative	<i>Scope not fixed</i> <i>Fixed scope</i> <i>Smaller scope</i> <i>Larger scope</i>	You define the inspection scope. For example, you specify whether the number of inspected units at results recording can be smaller or greater than the precalculated number of units to be inspected.
Quantitative/ qualitative	<i>No documentation</i> <i>Docu. if rejected</i> <i>Docu. required</i>	You define if and when additional text is to be entered, when you record results, for documentation purposes.
Quantitative/ qualitative	<i>Long-term inspection</i>	You define that the inspection is to take place over a long period of time. The usage decision can already have been made and the vendor can have been evaluated.
Quantitative/ qualitative	<i>Scrap share/ q-score</i>	You define whether the fraction of nonconforming units for this characteristic is taken into account, when the scrap share for the inspection lot is calculated (this only occurs if specific quality scores are used when the usage decision is made).
Quantitative/ qualitative	<i>RR change docs</i>	You define whether change documents are to be written for results recording based on characteristics.
Quantitative/ qualitative	<i>Test-equi assignment</i>	You define whether you can assign test equipment to the master inspection characteristic in the task list.
Quantitative/ qualitative	<i>Print</i> <i>Do not print</i> <i>Do not print at skip</i>	You define whether and under which conditions the master inspection characteristic is printed on the inspection instruction.

Control Indicators for the Inspection Characteristic

qualitative	<i>Charac. attribute</i>	You define whether you reference codes from a selected set in results recording, or whether you evaluate manually with accepted or rejected. If you set this indicator, it affects the assignment of code groups and codes [Page 61] .
qualitative	<i>Defects confirmation</i>	You define whether defects are to be recorded if the characteristic is rejected.



The following critical indicators (indicators that can lead to inconsistencies if a master inspection characteristic that is used in a task list or in a material specification is changed without history) cannot be changed: *Sampling procedure, SPC characteristic, Test-equi assignment, Calculated charac., Charac. attribute, Lower specif. limit, Upper specif. limit.*

If the master inspection characteristic is linked to a numeric class characteristic, you cannot change the following control indicators: *Lower specif. limit, Upper specif. limit, Confirm values, Classed recording.*

If the master inspection characteristic is linked to a numeric class characteristic with reference to a selected set, you cannot change the *Charac. attribute* control indicator.

If a master inspection characteristic is referenced in a material specification or included in a task list as a reference characteristic and you make a change without history, a change to the control indicators can lead to inconsistencies. You should therefore make a consistency check on the task lists and material specifications, in which this master inspection characteristic is included as a reference.

Quantitative Data

Quantitative Data

For quantitative characteristics, you can define additional specific quantitative data, depending on the control indicators you have set. You call this function using the *Quant. data* pushbutton on the general data screen for the master inspection characteristic.

- For example, when you set the control indicators, if you specified that a lower and an upper specification limit were to be inspected, the system displays a *Quantitative Data* dialog box, in which you can enter data for these specification limits.
- If, however, you defined that only the upper or lower specification limit is to be inspected, the system only displays the fields that correspond to the limit you selected.
- If you use a tolerance key, the system copies the values from this tolerance key into the master inspection characteristic. You can, however, overwrite these values.



A tolerance key groups industry-standard tolerance specifications, or those used in a particular sector (for example for fit) for a quantitative characteristic. A unit of measurement, target value, the accuracy and upper and lower specification limit are defined for the tolerance key.

Your system administration can define nominal values for the tolerance keys in [Customizing \[Ext.\]](#) These nominal values are based on tables in the DIN standards. If nominal values were defined for a tolerance key, the specification limits can vary on the basis of these nominal values.

You call this function using the menu path *Goto → Tolerance keys...* on the general data screen for the master inspection characteristic. If you check the data after entry, the system also displays the values for the unit of measurement and target value that were defined for this key and determines whether the specification limits are relative values for the target value. This only occurs if you have set the relevant indicator in Customizing.

If you delete a tolerance key, the values that were defined by the tolerance key in the inspection characteristic are not deleted. They remain as characteristic specifications.

Assigning Inspection Methods

Prerequisites

The inspection method that you want to assign to the master inspection characteristic must already exist in the system.

Procedure

1. On the general data screen for the master inspection characteristic, choose *Insp. methods*.

The *Assigned Inspection Methods* screen appears.



You can assign several inspection methods to a master inspection characteristic, however, you can only assign one inspection method to an inspection characteristic in a task list.

2. In the *Method* field, enter an inspection method directly, or by using the input help.



If you enter the inspection method directly, the current version of the inspection method is assigned to the master inspection characteristic. If you select an inspection method using the input help, you can assign each inspection method version, if you set the *All versions* indicator on the selection screen. If you do not set this indicator, the system only displays the current versions of the inspection method in the selection list.

3. Choose *Continue*.

The general data screen for the master inspection characteristic reappears.

4. Save your data.

Additional Functions in Inspection Method Assignment

Function	Menu Path/ Pushbutton	What You Should Know
Checking an assignment	<i>Check</i> pushbutton	After you have assigned the inspection methods, you can have the system check your entries.
Deleting a method assignment	<i>Delete assignment method</i> pushbutton	You can cancel the assignment of the inspection methods you selected.
Displaying a method	<i>Display Method</i> pushbutton	You can display the selected inspection methods.

Assigning Inspection Methods

Assigning code groups or selected sets to the method	<i>Catalog details...</i> pushbutton	<p>You can assign code groups or selected sets to an inspection method. The procedure for assigning catalogs to an inspection method is similar to the procedure for the assignment of code groups or selected sets to a master inspection characteristic [Page 61].</p> <p></p> <p>If code groups or selected sets are assigned both in the master inspection characteristic and to the inspection method, the data assigned to the inspection method has precedence in the task list. The data assigned to the master inspection characteristic is assigned by item, if the item does not already have an entry.</p> <p>If, for example, catalog data is assigned to the inspection method in items 1, 2 and 4 and to the master inspection characteristic in items 1, 2 and 3, then the catalog data for the master inspection characteristic is assigned in the task list in item 3, in addition to the data from the inspection method.</p>
Display assignment history	<i>Assignment history</i> pushbutton	You can display a chronological list of all inspection methods that were assigned to the master inspection characteristic.
Check catalog assignment	<i>Check</i> pushbutton on <i>Inspection Catalogs for Inspection Method</i> screen	After you have assigned code groups or selected sets to the inspection method, you can have the system check your entries.
Display catalogs	<i>Display catalog</i> pushbutton on <i>Inspection Catalogs for Inspection Method</i> screen	You can display the selected code groups or selected sets.
Display assignment history	<i>Assignment history</i> pushbutton on <i>Inspection Catalogs for Inspection Method</i> screen	You can display a chronological list of all code groups or selected sets that were assigned to the inspection method.

Assigning Code Groups or Selected Sets

Prerequisites

The code group(s) or selected set(s) that you want to assign must already exist in the system.

Procedure

2. On the general data screen for the master inspection characteristic, choose *Catalogs*.

The *Assigned Inspection Catalogs* screen appears.

2. In field *C*, enter a catalog type.



You **cannot** assign selected sets from catalog type 1, to qualitative characteristics, for which the characteristic attributes indicator is not set, or to quantitative characteristics.

3. If you want to assign a selected set to the master inspection characteristic, set the indicator *S*.



If you edit a qualitative characteristic, for which the *Characteristic attribute* indicator is set, the system sets this indicator automatically. This means that you must choose a selected set as the entry for the first assignment.

4. In the *CGr/SSet* field, enter the identifier for one or more code group(s) or selected set(s). If necessary, use the input help.



If you are editing a quantitative characteristic or a qualitative characteristic for which the *Charac. attribute* indicator is **not** set, you can assign up to four code groups or selected sets to the master inspection characteristic.

You can assign up to five code groups or selected sets to a qualitative characteristic, for which you have set the *Charac. attribute* indicator.

If you are editing a qualitative characteristic for which you have set the *Charac. attribute* indicator is set, the system automatically enters catalog type 1 in the field *C* and sets the selected set indicator in the first line for assigning a catalog. This means that the first entry is reserved for selected sets of catalog type 1. In this case, you can **only** enter catalog type 1 in this field.

If you choose a selected set using the input help, the system automatically enters the plant for the selected set in the *Plnt* field. When entering a selected set manually, you must also enter the plant manually.

5. If necessary, in the *Defect codes for rejection* field, assign code groups and codes from the defect catalog (catalog 9) to the master inspection characteristic. These are used to create a defect data record for inspection characteristics that are rejected during results recording. You can assign the following defect codes:

- For a general rejection

Assigning Code Groups or Selected Sets

- For a rejection when the upper specification limit is exceeded
- For a rejection when the lower specification limit is exceeded



The *General* entry field in the *Defect codes* section is always ready for input.

You can only enter a code for the upper or lower specification limit rejection, if the corresponding specification limit indicator is set in the control indicators for the quantitative characteristic.

If you have defined specification limits for a characteristic and you do not maintain the corresponding codes for the specification limit rejections, then the *General* code is used for the *Defect codes for rejection*.

If the *Defects recording* control indicator is set and you have not even maintained the *General* rejection code, then manual defects recording is automatically called up during defects recording, if a characteristic is rejected.

6. Choose *Continue*.

The general data screen for the master inspection characteristic reappears.

7. Save your data.

Additional Functions in Catalog Assignment

Function	Menu Path/ Pushbutton	What You Should Know
Check catalog assignment	<i>Check</i> pushbutton	After you have assigned code groups or selected sets to the master inspection characteristic, you can have the system check your entries.
Display catalogs	<i>Display catalog</i> pushbutton	You can display the selected code groups or selected sets.
Display assignment history	<i>Assignment history</i> pushbutton	You can display a chronological list of all code groups or selected sets that were assigned to the master inspection characteristic.

See also:

[Defects Recording \[Ext.\]](#)

Inspector Qualification

For master inspection characteristics and inspection methods, you can define which qualifications an inspector must have, to carry out an inspection.

The inspector's qualification that is used in the inspection plan is determined as follows:

- If a master inspection characteristic for which you entered an inspector qualification is used in an inspection plan, the inspector qualification defined in the characteristic is valid in the plan.
- If you reference a master inspection characteristic in the inspection plan to which an inspection method is assigned and if an inspector qualification is defined both in this inspection method and in the master inspection characteristic, the qualification defined in the method takes precedence in the plan.



If you reference such a master inspection characteristic in the plan, you cannot overwrite the value for the inspector qualification. You can only change this value, if you copy the master inspection characteristic.

Listing Master Inspection Characteristics

Listing Master Inspection Characteristics

Use

Using this function, you can display or print all available master inspection characteristics in a list.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection characteristic* → *List*
2. On the selection screen, enter the data you require:
 - If you set the *Monitor control* indicator in the *Status* section, the system uses a traffic light to display the status of the master inspection characteristic in the list.
 - You can control the format of the list, by using the [display variant \[Ext.\]](#).
 - You can use the *User variant* to define user-specific default values for the selection of characteristics.
 - In the *Print parameters* screen section, you can enter the form that you want to use as a print template for master inspection characteristics.



You can replace the standard form supplied with the R/3 System with your own form. In this case, enter the name of the required form. If you create your own form, make sure that you do not change the names of the text elements.

- If you set the *Print dialog* indicator in the *Print parameters* section, you can display the created form using the function for the *Print preview* and change the print parameters. If you did **not** set the *Print dialog* indicator in the *Print parameters* section, the system prints the form immediately.



You can only print the description for the master inspection characteristics in the logon language.

3. Choose *Execute*.

The system generates a list of all master inspection characteristics that meet your selection criteria.

4. The following functions for the selected master inspection characteristics are available in the list:

To	Choose
Display a master inspection characteristic	<i>Display master inspection characteristic</i>
Print a master inspection characteristic	<i>Print master inspection characteristic</i>
Edit the control chart for a master inspection characteristic	<i>Edit control charts</i>

Listing Master Inspection Characteristics

Display the results history for a master inspection characteristic	<i>Display results history</i>
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Deleting a Master Inspection Characteristic

Deleting a Master Inspection Characteristic

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection characteristic* → *Delete*
2. On the initial screen, enter the plant and the master inspection characteristic to be deleted.



You can **only** delete a master inspection characteristic, if the usage indicator is not set for any validity period of the version; (this means that the master inspection characteristic was never used in a task list, material specification, or certificate profile). In this case, you must first delete all links between the objects and set the status of the master inspection characteristic to *Deletion flag*. The master inspection characteristic can then be deleted in the next [archiving run \[Ext.\]](#).

The system always deletes a complete validity period.

3. Choose *Master inspection characteristic*.

The general data screen for the master inspection characteristic appears.



If there are several versions of the master inspection characteristic to be deleted, a list of all characteristic versions appears, from which you can select the version you want to delete.

4. To delete the master inspection characteristic, choose *Delete*.
5. Confirm the security prompt.

The initial screen reappears and the system confirms that the master inspection characteristic was deleted.

Displaying the Use of Master Inspection Characteristics

Use

Master inspection characteristics can be used in inspection plans, (reference characteristics, copied, unlocked master inspection characteristics), material specifications (copied master inspection characteristics) and certificate profiles (reference characteristics). The where-used list displays the task lists, material specifications and certificate profiles, in which a particular master inspection characteristic is used.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection characteristic* → *Where-used list*.
2. On the initial screen, enter a characteristic number and a plant. If necessary, use the input help.



The input help list only contains one version of the master inspection characteristic – the **current version**. If there are other versions of the master inspection characteristic, they are not displayed in the list. This can result in the following:

- The version on the list is not yet released or is not referenced. If you select and try to process such a version from the list, you receive a message that the master inspection characteristic is not referenced.
- Another version of the master inspection characteristic (that is not displayed in the list) may be referenced. In this case, you should delete the version number from the initial screen and continue processing.

You cannot reference master inspection characteristics with status 1 in task lists or material specifications. In addition, you can only reference master inspection characteristics that are completely maintained. Therefore choose a master inspection characteristic that has status 2 and is maintained as a reference characteristic.

3. To display a particular version of an inspection characteristic, enter the required version.

If you do not make an entry, the usage overview includes all versions of the master inspection characteristic.

4. Choose *Usage*.

If the master inspection characteristic is used in at least one inspection plan, a usage overview of the task lists appears which displays the following data:

- Name of the master inspection characteristic
- Plant
- Key date
- Total number of times used, as well as the number of uses in task lists, material specifications and certificate profiles
- Task list type, task list group, group counter and task list description

Displaying the Use of Master Inspection Characteristics

- Operation number
- Characteristic number
- Sampling procedures
- Change number
- Dynamic modification rule
- SPC



The data displayed corresponds to the usage overview that is currently selected (highlighted in color).

You can switch between the overview screens for the usage of master inspection characteristics in task lists, material specifications or certificate profiles by clicking hotspots. There are different lists for the entries in the usage overview.

5. You can call up other functions from the usage overviews:

Overview	Function	Menu Path/Pushbutton
Task lists	Displaying usage for other master inspection characteristic	<i>Master inspection characteristic</i> → <i>Other master inspection characteristic</i>
	Replacing a master inspection characteristic	<i>Master inspection characteristic</i> → <i>Replace</i>
	Downloading	<i>Master inspection characteristic</i> → <i>Download</i>
	Printing list	<i>Print list</i> pushbutton
	Displaying the class characteristic	<i>Display class characteristic</i> pushbutton
	Displaying master inspection characteristic	<i>Display master inspection characteristic</i> pushbutton
	Displaying characteristic in task list	<i>Display characteristic in task list</i> pushbutton
	Displaying usage in material specification	Hotspot
	Displaying usage in certificate profiles	Hotspot
	Displaying dynamic modification rule	Hotspot in table
Material specification	Displaying usage for other master inspection characteristic	<i>Master inspection characteristic</i> → <i>Other master inspection characteristic</i>
	Downloading	<i>Master inspection characteristic</i> → <i>Download</i>

Displaying the Use of Master Inspection Characteristics

	Printing list	<i>Print list</i> pushbutton
	Displaying material specification	<i>Specification for characteristic</i> pushbutton
	Displaying master inspection characteristic	<i>Display master inspection characteristic</i> pushbutton
	Displaying usage in task lists	Hotspot
	Displaying usage in certificate profiles	Hotspot
	Displaying sampling procedure	Hotspot in table
	Displaying sampling procedure	Hotspot in table
Certificate profiles	Displaying usage for other master inspection characteristic	<i>Master inspection characteristic</i> → <i>Other master inspection characteristic</i>
	Downloading	<i>Master inspection characteristic</i> → <i>Download</i>
	Printing list	<i>Print list</i> pushbutton
	Displaying certificate profile	<i>Display certificate profile</i> pushbutton
	Displaying the class characteristic	<i>Display class characteristic</i> pushbutton
	Displaying master inspection characteristic	<i>Display master inspection characteristic</i> pushbutton
	Displaying usage in task lists	Hotspot
	Displaying usage in material specification	Hotspot

Replacing Master Inspection Characteristics

Replacing Master Inspection Characteristics

Use

In the *Quality Management* application component, you can replace the following master inspection characteristics:

- Master inspection characteristics that are referenced in one or more task lists
- Master inspection characteristics that are referenced in material specifications
- Master inspection characteristics with inspection methods that are referenced in task lists



You cannot replace a master inspection characteristic, if for example, it is no longer referenced, it was created as an incomplete copy model or it was controlled by a customer exit. You can recognize these cases, since the master inspection characteristic is marked by a block indicator (padlock) in the where-used list that is created.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection characteristic* → *Replace*.
2. On the initial screen, enter a characteristic number and a plant for the master inspection characteristic that you want to replace (*characteristic no.*) and a characteristic number, a plant and a version for the new master inspection characteristic (*New characteristic*). If necessary, use the input help.



The input help list only contains one version of the master inspection characteristic – the **current version**. If there are other versions of the master inspection characteristic, they are not displayed in the list. This can result in the following:

- The version on the list is not yet released or is not referenced. If you select and try to process such a version from the list, you receive a message that the master inspection characteristic is not referenced.
- Another version of the master inspection characteristic (that is not displayed in the list) may be referenced. In this case, you should delete the version number from the initial screen and continue processing.

You cannot reference master inspection characteristics with status 1 in task lists or material specifications. In addition, you can only reference master inspection characteristics that are completely maintained. Therefore choose a master inspection characteristic that has status 2 and is completely maintained.

3. If necessary, enter a replacement inspection method.



When you replace a master inspection characteristic in a task list, any references to inspection methods (if they exist in the characteristic being replaced) are also

Replacing Master Inspection Characteristics

removed from the task list. To add an inspection method to the replacement master inspection characteristic, you must enter the inspection method data (method number, plant, and version).

If you enter an inspection method, it must already have been assigned to the replacement master inspection characteristic. Use the possible entries help to select an inspection method using a master inspection characteristic.

4. Enter the required key date, from which you want the replacement to take effect.



If you enter a change number, the date of this number is the key date, from which the replacement applies.

5. Set the *Disp. all records* indicator, if you want to display all master inspection characteristics in the where-used list that are referenced in task lists.
6. Choose *Usage*.

If the master inspection characteristic is used in at least one inspection plan, the system displays a list of all task lists, material specifications and certificate profiles, in which the master inspection characteristic to be replaced is used. The operation number and characteristic number are shown for each task list.

7. Select the task lists or material specifications, in which you want to replace the master inspection characteristic.



The data displayed corresponds to the usage overview that is currently selected (highlighted in color).

8. Define the [replacement mode \[Ext.\]](#) (optional).
9. Choose *Start*.



If you have not already defined the replacement mode, a dialog box appears, in which you can specify this mode.

10. To determine if the replacement was successful, check the [replacement log \[Ext.\]](#) (created automatically after the replacement is carried out).
11. You can call up other functions from the usage overviews:

Overview	Function	Menu Path/Pushbutton
Task lists	Displaying usage for other master inspection characteristic	<i>Master inspection characteristic → Other master inspection characteristic</i>
	Downloading	<i>Master inspection characteristic → Download</i>
	Displaying the class characteristic	<i>Goto → Display class characteristic</i>
	Printing list	<i>Print list pushbutton</i>

Replacing Master Inspection Characteristics

	Updating list	<i>Update list</i> pushbutton
	Entering replacement mode	<i>Settings</i> pushbutton
	Displaying master inspection characteristic	<i>Display master inspection characteristic</i> pushbutton
	Batch input	<i>Batch input</i> pushbutton
	Displaying usage in material specification	Hotspot
	Displaying usage in certificate profiles	Hotspot
	Displaying sampling procedure	Hotspot in table
	Displaying dynamic modification rule	Hotspot in table
Material specification	Displaying usage for other master inspection characteristic	<i>Master inspection characteristic</i> → <i>Other master inspection characteristic</i>
	Downloading	<i>Master inspection characteristic</i> → <i>Download</i>
	Printing list	<i>Print list</i> pushbutton
	Displaying material specification	<i>Specification for material</i> pushbutton
	Displaying the class characteristic	<i>Display class characteristic</i> pushbutton
	Displaying master inspection characteristic	<i>Display master inspection characteristic</i> pushbutton
	Displaying usage in task lists	Hotspot
	Displaying usage in certificate profiles	Hotspot
	Displaying sampling procedure	Hotspot in table
Certificate profiles	Displaying usage for other master inspection characteristic	<i>Master inspection characteristic</i> → <i>Other master inspection characteristic</i>
	Downloading	<i>Master inspection characteristic</i> → <i>Download</i>
	Printing list	<i>Print list</i> pushbutton
	Displaying certificate profile	<i>Display certificate profile</i> pushbutton
	Displaying the class characteristic	<i>Display class characteristic</i> pushbutton

Replacing Master Inspection Characteristics

	Displaying master inspection characteristic	<i>Display master inspection characteristic</i> pushbutton
	Displaying usage in task lists	Hotspot
	Displaying usage in material specification	Hotspot

Distribution of Master Inspection Characteristics Using ALE

Distribution of Master Inspection Characteristics Using ALE

Use

The QM application component enables you to extensively automate the processing of master inspection characteristics for all systems. You can either trigger the distribution manually or automatically (depending on the settings in Customizing).

Integration

The distribution function for the master inspection characteristics is integrated in the general functions for the ALE processing of master data in the SAP System.

Since IDocs for links between master inspection characteristics and the classification system are also created and sent when master inspection characteristics are distributed using ALE, you should note that the following objects are also sent to target systems and IDocs must be posted there:

- IDocs from Quality Management that contain the links
- The affected classes from the classification system



If change documents are written when changes are made in the classification system and the automatic distribution of data using ALE is defined for these change documents, IDocs (containing the link from master inspection characteristics and classes) with the same content can be distributed several times to target systems. However, this does not have any negative effects on the target systems (for example, on performance).

Prerequisites

- You must have made the relevant settings in Customizing.
- If you want to distribute master inspection characteristics to target systems using ALE, you should perform an ALE distribution for inspection methods beforehand. Otherwise, errors can occur during the distribution of master inspection characteristics, if they are assigned to inspection methods that were not yet distributed to target systems.
- If you want to distribute master inspection characteristics using ALE, you should deactivate the manual deletion function for master inspection characteristics (transaction QS25) in the source system.

Features

1. The SAP System reads the manually selected data from the database of the source system and creates an IDoc for each master inspection/plant combination.
2. The IDoc is sent to the target systems that you have specified or maintained in the distribution model.
3. In the target system, the data from the IDoc is written to the application tables in the SAP System after various checks have been carried out.

Distribution of Master Inspection Characteristics Using ALE

- The checks that are made are similar to those that take place when a master inspection characteristic is created manually.
 - When you send the characteristics, **all** data in the target system is overwritten (for example, if there are only 2 versions of a master inspection characteristic in the source system and there are 4 versions in the target system, there will only be the 2 versions from the source system after the characteristics have been distributed using ALE). This only applies if none of the versions of the master inspection characteristic, which should be deleted in the target system, are already in use. If a version is already in use, the system cancels the posting of the IDoc in the target system, the data is not saved in the target system, a message is created, and if necessary, a workflow is triggered.
4. If an error occurs or a message is issued during one of the checks, this is documented in the ALE tool. If errors occur, the processing is cancelled and the data is not saved in the target system.

If the error, which causes the posting of the IDoc to be canceled (for example, if the affected object is locked by a user), can be eliminated in the target system, you can manually trigger the posting in the target system again.
 5. In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

Sending Master Inspection Characteristics

Sending Master Inspection Characteristics

Use

You use this function to manually distribute master inspection characteristics to (several) target systems.



Since IDocs for the links between master inspection characteristics and the classification system are also created and sent when master inspection characteristics are distributed using ALE, you should note that the following objects must also be sent to target systems:

- IDocs from Quality Management that contain the links
- The affected classes from the classification system



If change documents are written when changes are made in the classification system and the automatic distribution of data using ALE is defined for these change documents, IDocs (containing the link from master inspection characteristics and classes) with the same content can be distributed several times to target systems. However, this does not have any negative effects on the target systems (for example, on performance).

Prerequisites

- You must have made the relevant settings in Customizing.
- If you want to distribute master inspection characteristics to target systems using ALE, you should perform an ALE distribution for inspection methods beforehand. Otherwise, errors can occur during the distribution of master inspection characteristics, if they are assigned to inspection methods that were not yet distributed to target systems.
- If you want to distribute master inspection characteristics using ALE, you should deactivate the manual deletion function for master inspection characteristics (transaction QS25) in the target system.

Procedure

1. Choose *Tools* → *ALE* → *Master data distribution* → *Logistics* → *Quality management* → *Master inspection characteristic* → *Send*.
2. On the initial screen, enter the master inspection characteristics that should be sent.



You can limit the selection further by entering the plant.

3. Enter the logical target system, if you do not want the target system(s) to be taken from the distribution model (in Customizing).



Sending Master Inspection Characteristics

You can enter each target system that is maintained as a logical system. If you did not enter a target system, the data is sent to **the** target systems that were entered in the distribution model.

4. Choose *Execute*.

The system reads the selected data from the database of the source system and writes it to one or more IDocs.



One IDoc is created for each master inspection characteristic and plant.

5. In the target system, choose *Tools* → *ALE* → *ALE Administration* → *Services* → *Manually process IDocs*.
6. From the list, select the IDocs to be transferred and choose *Process*.



You can automate processing. This means that the posting of the IDocs occurs immediately and does not have to be triggered manually.

7. Enter the IDoc number in the target system and choose *Execute*.

Result

- After running various checks, the system writes the master inspection characteristics to the application tables in the target system.
- If an error occurs or a message is issued during one of the checks, this is documented in the ALE tool. If errors occur, the processing is cancelled and the data is not saved in the target system.

If the error, which causes the posting of the IDoc to be canceled (for example, if the affected object is locked by a user), can be eliminated in the target system, you can manually trigger the posting in the target system again.
- In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

Inspection Method (QM-PT-BD-IMT)

Purpose

You use inspection methods to describe how to carry out an inspection for an inspection characteristic. You can create master inspection methods at plant level to simplify and standardize the inspection planning activities and to standardize the nomenclature. This allows you to plan inspections systematically, uniformly, and economically.

Integration

Inspection methods are used in:

- **Task lists**

When creating task lists, you can reference inspection methods directly in the [inspection plan \[Ext.\]](#), or indirectly at characteristic level using [master inspection characteristics \[Page 31\]](#).

- **Master inspection characteristics**



You can assign several inspection methods to a master inspection characteristic, however, you can only assign one inspection method to an inspection characteristic in a task list.

Features

Using the *Inspection Methods* component, you can:

- Describe the implementation of the inspection
- Define the qualifications for inspectors. The specifications in the inspection method take precedence over the specifications from the master inspection characteristics.
- Manage inspection methods as master records independently of a task list, edit the inspection methods centrally, and use the same master record numerous times in different task lists
- Create a where-used list to determine in which master inspection characteristics and task lists an inspection method is used.



If you reference an inspection method, the system automatically sets a usage indicator so you cannot inadvertently delete the inspection method.

- Search and replace inspection methods in task lists
- Make changes to inspection methods with or without history. You specify the required plant-specific default value for this function in the [Customizing \[Ext.\]](#) application. However, you can also create a new version for a validity period manually. A version management function ensures that all changes are documented.
- Create [several versions \[Page 151\]](#) of an inspection method (for example, with different validity periods)

Inspection Method (QM-PT-BD-IMT)

- Find the required version of an inspection method with different validity periods by specifying the key date
- Classify inspection methods
- Assign inspection methods to master inspection characteristics
- Create inspection methods in different languages
- Link documents (for example, specific inspection instructions, drawings etc.) to the inspection method and can display these linked documents.

See also:

[Displaying the Use of Inspection Methods \[Page 86\]](#)

[Replacing Inspection Methods \[Page 88\]](#)

Creating or Changing the Inspection Method

Creating or Changing the Inspection Method

Prerequisites

If you want to change an inspection method with history, you must have set the corresponding indicator in [Customizing \[Ext.\]](#).

Procedure

1. Proceed as follows:

To...	Choose	On the initial screen, enter the following data:
Create a new inspection method	<i>Logistics → Quality management → Quality planning → Basic data → Inspection method → Create</i>	<ul style="list-style-type: none"> • Plant • Name of inspection method (optional) • Valid from • Reference data (optional)
Create a new validity period (version) for an existing inspection method	<i>Logistics → Quality management → Quality planning → Basic data → Inspection method → Create version</i>	<ul style="list-style-type: none"> • Plant • Name of inspection method • Valid from • Reference data (optional)
Change an existing inspection method	<i>Logistics → Quality management → Quality planning → Basic data → Inspection method → Change</i>	<ul style="list-style-type: none"> • Plant • Name of inspection method • Key date (optional)
Display an existing inspection method	<i>Logistics → Quality management → Quality planning → Basic data → Inspection method → Display</i>	<ul style="list-style-type: none"> • Plant • Name of inspection method • Key date (optional) • Version of the inspection method to be displayed (optional)

2. Choose *Inspection method*.

The general data screen for the inspection method appears.

3. Enter a short text and, if required, a long text and a search field, and set the required status.

4. If necessary, enter the following additional information:

- Authorization group
- [Inspector qualification \[Page 83\]](#)
- Info fields (purely informative data for the inspection method)

Creating or Changing the Inspection Method



In the screen area *Administrative data*, the validity of the inspection method, creator, creation date, and, if available, the person who makes the changes and the change date are displayed.

5. Save your data.



If you changed an inspection method that is referenced in an inspection plan and you make the changes [without history \[Page 148\]](#), the changes are also included in the inspection plan, since the system does not create a new [inspection method version \[Page 151\]](#) in this process.

However, if you change the method **with history**, the system creates a new version with the same validity period. In this case, the changes are not included in the inspection plan, because it still uses the previous version of the inspection method.

You can make settings in [Customizing \[Ext.\]](#) at client level, to trigger the replacement function automatically, when an inspection method is saved.

Additional Functions on the General Data Screen for the Inspection Method

Function	Menu Path/ Pushbutton	What You Should Know
Displaying the time line	<i>Time line</i> pushbutton	You can display a list of all valid versions of the inspection method (in chronological order). From the list, you can display the version you require.
Displaying the field history	<i>Field history</i> pushbutton	You can display the change history for a field. If you made changes to a master record without history , the system displays only the current value in the field. If, however, you made the changes with history , the system lists all changes with the name of the user who changed the field, the date the field was changed, and all the previous values of the field.
Editing the long text	<i>Create/change long text</i> pushbutton	You can create or change a long text for the inspection method.
Editing other languages	<i>Other languages</i> pushbutton	You can create, change or display the short text for the inspection method in other languages.
Editing the classification	<i>Classification</i> pushbutton	You can classify [Ext.] inspection methods, to systematically define, search for and re-use inspection methods.
Linking/displaying documents	<i>Documents</i> pushbutton	You can link documents (for example, specific inspection instructions, drawings etc.) to the inspection method and can display these linked documents.

Creating or Changing the Inspection Method

Finding documents	<i>Find document</i> pushbutton	On the screen for displaying the linked documents, you can search for documents that you want to link to the inspection method.
Displaying documents	<i>Display document</i> pushbutton	On the screen for displaying the linked documents, you can display information that has been maintained for the documents in the Document Management System that is linked to the inspection method.
Displaying the original	<i>Display original</i> pushbutton	On the screen for displaying the linked documents, you can display the original documents that are linked to the inspection method.
Printing the original	<i>Print original</i> pushbutton	On the screen for displaying the linked documents, you can print the original documents that are linked to the inspection method.

See also:

[Assigning Inspection Methods \[Page 59\]](#)

Inspector Qualification

For master inspection characteristics and inspection methods, you can define which qualifications an inspector must have, to carry out an inspection.

The inspector's qualification that is used in the inspection plan is determined as follows:

- If a master inspection characteristic for which you entered an inspector qualification is used in an inspection plan, the inspector qualification defined in the characteristic is valid in the plan.
- If you reference a master inspection characteristic in the inspection plan to which an inspection method is assigned and if an inspector qualification is defined both in this inspection method and in the master inspection characteristic, the qualification defined in the method takes precedence in the plan.



If you reference such a master inspection characteristic in the plan, you cannot overwrite the value for the inspector qualification. You can only change this value, if you copy the master inspection characteristic.

Listing Inspection Methods

Listing Inspection Methods

Use

Using this function, you can display or print all available inspection methods in a list.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection method* → *List*
2. On the selection screen, enter the data you require:
 - If you set the *Monitor control* indicator in the *Status* section, the system displays a traffic light for the status of an inspection method in the list.
 - You can control the format of the list, by using the [display variant \[Ext.\]](#).
 - You can use the *User variant* to define user-specific default values for the selection of inspection methods.
 - In the *Print parameters* screen section, you can enter the form that you want to use as a print template for inspection methods.



You can replace the standard form supplied with the R/3 System with your own form. In this case, enter the name of the required form. If you create your own form, make sure that you do not change the names of the text elements.

- If you set the *Print dialog* indicator in the *Print parameters* section, you can display the created form using the function for the *Print preview* and change the print parameters. If you did **not** set this indicator, the system prints the form immediately.



You can only print the description for the inspection methods in the logon language.

3. Choose *Execute*.

The system generates a list of all inspection methods that meet your selection criteria.

4. The following functions for the selected inspection methods are available in the list:

To	Choose
Display an inspection method	<i>Display inspection method</i>
Print an inspection method	<i>Print inspection method</i>

Deleting an Inspection Method

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection method* → *Delete*
2. On the initial screen, enter the plant and the inspection method to be deleted.



You can **only** delete an inspection method, if the usage indicator is not set for any validity period of the version; (this means that the inspection method was never used in a task list, or master inspection characteristic). In this case, you must first delete all links between the objects and set the status of the inspection method to *Deletion flag*. The inspection method can then be deleted in the next [archiving run \[Ext.\]](#).

The system always deletes a complete validity period.

3. Choose *Inspection method*.

The general data screen for the inspection method appears.



If there are several versions of the inspection method to be deleted, a list of all method versions appears, from which you can select the version you want to delete.

4. To delete the inspection method, choose *Delete*.
5. Confirm the security prompt.

The initial screen reappears and the system confirms that the inspection method was deleted.

Displaying the Use of Inspection Methods

Displaying the Use of Inspection Methods

Use

Inspection methods can be referenced in master inspection characteristics and inspection characteristics in a task list.

The where-used list displays the master inspection characteristics and task list characteristics, in which an inspection method is used.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection method* → *Where-used list*.
2. On the initial screen, enter an inspection method and a plant. If necessary, use the input help.



The input help list only contains one version of the inspection method – the **current version**. If there are additional versions available for the inspection method, these are not displayed in the list. This can result in the following:

- The version on the list is not yet released or is not referenced. If you select and try to process such a version from the list, you receive a message that the inspection method is not referenced.
- Another version of the inspection method, (one that is not on the list), may be referenced. In this case, you should delete the version number from the initial screen and continue processing.

You cannot reference inspection methods with status 1 in master inspection characteristics or task list characteristics. Therefore, choose an inspection method with status 2.

3. To display a particular version of an inspection method, enter the required version. If you do not make an entry, the usage overview includes all versions of the inspection method.
4. Choose *Usage*.

If the inspection method is used in at least one master inspection characteristic or task list characteristic, a usage overview appears which displays the following data:

- Name of the inspection method
- Key date
- Task list type and task list group
- Operation number
- Characteristic number and characteristic description for the master inspection characteristic or task list characteristic, in which the inspection method is referenced.

Displaying the Use of Inspection Methods



The list of master inspection characteristics for an inspection method is generated only if the method is used in a task list. If the method is not used in a task list, **no** lists are generated, even if the method is used in master inspection characteristics.

5. You can call up other functions from the usage overviews:

Overview	Function	Menu Path/Pushbutton
Inspection characteristic in a task list	Displaying usage for other inspection method	<i>Inspection method → Other inspection method</i>
	Replacing an inspection method	<i>Inspection method → Replace</i>
	Displaying a task list characteristic	<i>Goto → Display task list characteristic</i>
	Displaying usage in master inspection characteristic	<i>In master inspection characteristic pushbutton</i>
Master inspection characteristic	Displaying usage for other inspection method	<i>Inspection method → Other inspection method</i>
	Replacing an inspection method	<i>Inspection method → Replace</i>
	Displaying a task list characteristic	<i>Goto → Display task list characteristic</i>
	Displaying master inspection characteristic	<i>In master inspection characteristic pushbutton</i>
	Displaying usage in task list characteristic	<i>In task lists pushbutton</i>

Replacing an Inspection Method

Replacing an Inspection Method

Use

In the *Quality Management* application component, you can replace an inspection method that is used in task list characteristics.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Inspection method* → *Replace*.
2. On the initial screen, enter an inspection method and a plant for the inspection method that you want to replace (*Insp. method*) and an inspection method, a plant and a version for the new inspection method (*New method*). If necessary, use the input help.



The input help list only contains one version of the inspection method – the **current version**. If there are additional versions available for the inspection method, these are not displayed in the list. This can result in the following:

- The version on the list is not yet released or is not referenced. If you select and try to process such a version from the list, you receive a message that the inspection method is not referenced.
- Another version of the inspection method, (one that is not on the list), may be referenced. In this case, you should delete the version number from the initial screen and continue processing.

You cannot reference inspection methods with status 1 in task list characteristics. Therefore, choose an inspection method with status 2.

3. Enter the required key date, from which you want the replacement to take effect.



If you enter a change number, the date of this number is the key date, from which the replacement applies.

4. Set the *Disp. all records* indicator, if you want to display all inspection methods in the where-used list that are referenced in task list characteristics.
5. Choose *Usage*.

If the inspection method is used in at least one task list characteristic, a usage overview appears which displays all task lists that use the inspection method to be replaced. The operation number and characteristic number are shown for each task list.
6. Select the task lists, in which you want to replace the inspection method.
7. Define the [replacement mode \[Ext.\]](#) (optional).
8. Choose *Start*.

Replacing an Inspection Method



If you have not already defined the replacement mode, a dialog box appears, in which you can specify this mode.

9. To determine if the replacement was successful, check the [replacement log \[Ext.\]](#) (created automatically after the replacement is carried out).
10. You can call up other functions from the usage overviews:

Overview	Function	Menu Path/Pushbutton
Inspection characteristic in a task list	Displaying usage for other inspection method	<i>Inspection method → Other inspection method</i>
	Displaying usage for inspection method	<i>Inspection method → Display usage</i>
	Displaying a task list characteristic	<i>Goto → Display task list characteristic</i>
	Batch input	<i>Extras → Batch input</i>
	Displaying usage in master inspection characteristic	<i>Use In master inspection characteristic pushbutton</i>
Master inspection characteristic	Displaying usage for other inspection method	<i>Inspection method → Other inspection method</i>
	Displaying usage for inspection method	<i>Inspection method → Display usage</i>
	Displaying a task list characteristic	<i>Goto → Display task list characteristic</i>
	Displaying master inspection characteristic	<i>Display master inspection characteristic pushbutton</i>
	Displaying usage in task list characteristic	<i>Use in task list pushbutton</i>

Distribution of Inspection Methods Using ALE

Distribution of Inspection Methods Using ALE

Use

The QM application component enables you to extensively automate the processing of inspection methods for all systems. You can either trigger the distribution manually or automatically (depending on the settings in Customizing).

Integration

The distribution function for the inspection methods is integrated in the general functions for the ALE processing of master data in the SAP System.

Since IDocs for links between inspection methods and the classification system or document management system are also created and sent when master inspection characteristics are distributed using ALE, you should note that the following objects are also sent to target systems and IDocs must be posted there:

- IDocs from Quality Management that contain the links
- The affected classes from the classification system



If change documents are written when changes are made in the classification system and the automatic distribution of data using ALE is defined for these change documents, IDocs (containing the link from inspection methods and classes) with the same content can be distributed several times to target systems. However, this does not have any negative effects on the target systems (for example, on performance).

- The affected documents from the document management system

Prerequisites

- You must have made the relevant settings in Customizing.
- If you want to distribute master inspection characteristics to target systems using ALE, you should perform an ALE distribution for inspection methods beforehand. Otherwise, errors can occur during the distribution of master inspection characteristics, if they are assigned to inspection methods that were not yet distributed to target systems.
- If you want to distribute inspection methods using ALE, you should deactivate the manual deletion function for inspection methods (transaction QS35) in the source system.

Features

1. The SAP System reads the manually selected data from the database of the source system and creates an IDoc for each inspection method/plant combination.
2. The IDoc is sent to the target systems that you have specified or maintained in the distribution model.
3. In the target system, the data from the IDoc is written to the application tables in the SAP System after various checks have been carried out.



Distribution of Inspection Methods Using ALE

- The checks that are made are similar to those that take place when an inspection method is created manually.
 - During distribution, **all** data in the target system is overwritten (for example, if there are only 2 versions of an inspection method in the source system and there are 4 versions in the target system, there will only be the 2 versions from the source system after the methods have been distributed using ALE). This only applies if none of the versions of the inspection method, which should be deleted in the target system, are already in use. If a version is already in use, the system cancels the posting of the IDoc in the target system, the data is not saved in the target system, a message is created in the IDoc monitor, and if necessary, a workflow is triggered.
4. If an error occurs or a message is issued during one of the checks, this is documented in the ALE tool. If errors occur, processing is canceled and the data is not saved in the target system.

If the error, which causes the posting of the IDoc to be canceled (for example, if the affected object is locked by a user), can be eliminated in the target system, you can manually trigger the posting in the target system again.
 5. In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

[Distribution of Documents \[Ext.\]](#)

Sending Inspection Methods Using ALE

Sending Inspection Methods Using ALE

Use

You use this function to manually distribute inspection methods to (several) target systems



Since IDocs for links between inspection methods and the classification system or the document management system are also created and sent when master inspection characteristics are distributed using ALE, you should note that the following objects are also sent to target systems and IDocs must be posted there:

- IDocs from Quality Management that contain the links
- The affected classes from the classification system
- The affected documents from the document management system



If change documents are written when changes are made in the classification system and the automatic distribution of data using ALE is defined for these change documents, IDocs (containing the link from inspection methods and classes) with the same content can be distributed several times to target systems. However, this does not have any negative effects on the target systems (for example, on performance).

Prerequisites

- You must have made the relevant settings in Customizing.
- If you want to distribute master inspection characteristics to target systems using ALE, you should perform an ALE distribution for inspection methods beforehand. Otherwise, errors can occur during the distribution of master inspection characteristics, if they are assigned to inspection methods that were not yet distributed to target systems.
- If you want to distribute inspection methods using ALE, you should deactivate the manual deletion function for inspection methods (transaction QS35) in the source system.

Procedure

1. Choose *Tools* → *ALE* → *Master data distribution* → *Logistics* → *Quality management* → *Inspection method* → *Send*.
2. On the initial screen, enter the inspection methods that should be sent.



You can limit the selection further by entering the plant.

3. Enter the logical target system, if you do not want the target system(s) to be taken from the distribution model (in Customizing).



Sending Inspection Methods Using ALE

You can enter each target system that is maintained as a logical system. If you did not enter a target system, the data is sent to **the** target systems that were entered in the distribution model.

4. Choose *Execute*.

The system reads the selected data from the database of the source system and writes it to one or more IDocs.



One IDoc is created for each inspection method and plant.

5. In the target system, choose *Tools* → *ALE* → *ALE Administration* → *Services* → *Manually process IDocs*.
6. From the list, select the IDocs to be transferred and choose *Process*.



You can automate processing with a Customizing setting. This means, that the posting of the IDocs takes place immediately and does not have to be triggered manually.

7. Enter the IDoc number in the target system and choose *Execute*.

Result

- After running various checks, the system writes the inspection method for this IDoc to the application tables in the target system.
- If an error occurs or a message is issued during one of the checks, this is documented in the ALE tool. If errors occur, processing is canceled and the data is not saved in the target system.

If the error, which causes the posting of the IDoc to be canceled (for example, if the affected object is locked by a user), can be eliminated in the target system, you can manually trigger the posting in the target system again.
- In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

[Distribution of Documents \[Ext.\]](#)

Sample Determination (QM-PT-BD-SPL)

Sample Determination (QM-PT-BD-SPL)

Purpose

The automatic determination of samples is a part of the inspection process. The sampling procedures, sampling schemes, and dynamic modification rules serve as the basic data for the sample determination process.

To adapt the inspection to the expected quality level, the system can modify the inspection scope dynamically. With the help of the sampling procedures and dynamic modification rules stored in the inspection characteristics, the system modifies the inspection scope according to the current quality level.

Implementation Considerations

You use the *Sample Determination* component if you want:

- To evaluate inspection lots on the basis of samples
- The system to dynamically modify the inspection scope on the basis of the quality level
- To implement statistical process control (SPC) with the help of control charts or process capability indexes

Integration

On the basis of your predefined specifications, the system retrieves the information for the sample determination from the following sources:

Basic Data	What You Should Know
Sampling Scheme [Page 113]	The sampling scheme contains information for drawing samples, based on the size of the inspection lot and various inspection severities/AQLs. You can assign a sampling scheme to a sampling procedure.
Sampling Procedure [Page 96]	In addition to the information about the sampling type, the sampling procedure also contains information about the valuation mode for a characteristic during an inspection. If you assigned a sampling scheme to a sampling procedure, the system calculates the sample sizes to be used to inspect the material on the basis of the lot size and the inspection severity (or inspection severity and AQL value).
Dynamic Modification Rule [Ext.]	If you store a dynamic modification rule in the inspection plan, the system varies the sample size based on the past results. The dynamic modification rule and the sampling procedure must have an allowed relationship.

Sample Determination (QM-PT-BD-SPL)

<p>Task List [Ext.] or Material Specification [Ext.]</p>	<p>To calculate the sample size, you can assign a sampling procedure to the characteristics in an inspection plan or material specification. During inspection processing, the system calculates the sample sizes on the basis of the specifications in the inspection characteristics.</p>
<p>Material Master Record – Inspection Setup [Page 127]</p>	<p>To allow the system to calculate samples without a task list or material specification, in the inspection setup in the material master Quality Management view, enter a sampling procedure for the inspection type. Using a dynamic modification rule, the system can determine the sample size on the basis of the quality level. In this case, the system retrieves the dynamic modification criteria from the inspection lot origin.</p>

See also:

[Sampling Scheme Without Valuation Parameters \[Page 121\]](#)

[Defining Allowed Relationships \[Ext.\]](#)

[Dynamic Modification Criteria \[Ext.\]](#)

[Statistical Process Control \(SPC\) \[Ext.\]](#)

Sampling Procedure

Sampling Procedure

Definition

A sampling procedure defines the rules that specify how the system calculates the sample size and it contains information about the valuation of an inspection characteristic during results recording (attributive, variable, manual, etc.).

Use

Sampling procedures are usually used at characteristic level of a task list or material specification. You can however determine the sample size, without reference to task lists. To do this, you define a sampling procedure for the inspection type in the inspection setup (Quality Management view of the material master), or in [Customizing \[Ext.\]](#).

Structure

The rules for determining the sample are stored in the sampling type. The sampling type and valuation mode are combined for the inspection characteristics. This combination forms the structure of the sampling procedure.

Sampling Type

The sampling type defines how a sample is calculated (for example, fixed sample, 100% inspection, use sampling scheme, percentage sample). Together with the valuation mode, the sampling type defines the parameters for sample determination.

Using the sampling type, the system proposes a list of rules for sample determination. If there is only one rule available, this is automatically chosen.

Valuation Mode

The [valuation mode \[Page 101\]](#) (for example, attributive inspection on the basis of nonconforming units, variable inspection according to s-method [one limit], without valuation parameters) defines the rules for accepting or rejecting a characteristic or sample. The sampling type and the valuation mode specify which parameters the system uses to determine a sample size.

Inspection Points

If you want to use [inspection points \[Page 102\]](#) in the sampling procedure, you need to set an indicator for the corresponding application area. This indicator specifies how many inspection points are to be created for each inspection lot.

Usage Indicator

To prevent the sampling procedure from being referenced in a task list, you set the indicator *No use in insp.plan*.

The system automatically sets the indicator *Use in insp. plan*, if the sampling procedure is referenced in a task list.

Control Chart Type

If you want to use quality control charts in a sampling procedure, you must enter a quality control chart type. The control chart type specifies:

- The characteristics for which the control chart is suited
- The control variables a chart contains
- How the control limits are calculated

Special Indicator

If you do not want individual characteristics in an inspection plan to be [dynamically modified \[Ext.\]](#), you can assign a sampling procedure, in which the indicator *No stage change* is set. In this case, the system determines the inspection severity for calculating the sample size for these characteristics from the sampling procedure.

Multiple Samples

You can create sampling procedures to plan:

- Single samples and to record inspection results for a characteristic
- [Independent multiple samples \[Page 103\]](#) and to record inspection results from different samples for a characteristic
- [Dependent multiple samples \[Page 104\]](#) and to record inspection results from different samples for a characteristic

Integration

Sample Determination with Inspection Plan/Material Specification

If you use an inspection plan/material specification for sample determination, you assign a sampling procedure to the inspection characteristic or you define a sampling procedure in [Customizing \[Ext.\]](#).

If you also want a characteristic to be dynamically modified and if you want to use a sampling scheme for the sample determination, you must maintain the [allowed relationships \[Ext.\]](#) for the sampling procedure and dynamic modification rule directly after you save this sampling procedure.

You can only use certain sampling procedures in inspection plans, depending on whether you use inspection points. For example, if you want to use sampling procedures in sample management, you must specify the appropriate inspection point identifier in the sampling procedure.

Sample Determination Without Inspection Plan/Material Specification

If you do not use an inspection plan/material specification, you have the following options for maintaining the inspection type in the material master: In the [inspection setup \[Page 127\]](#) in the Quality Management view of the material master, you can:

- Set the *100% inspection* indicator
- Define a fixed sample percentage
- Specify a sampling procedure to be used for determining the sample size

Sampling Procedure

You can specify all sampling procedures. However, you can only use valuation modes that do not have valuation parameters. In addition, you can only use valuation modes without valuation parameters for determining samples with the help of a sampling scheme.

If you also want a characteristic to be dynamically modified and if you want to use a sampling scheme for the sample determination, you must maintain the allowed relationships for the sampling procedure and dynamic modification rule directly after you save this sampling procedure.

See also:

[Sampling Procedure with Fixed Sample \[Ext.\]](#)

[Sampling Procedure with Percentage Sample \[Ext.\]](#)

[Sampling Procedure with Sampling Scheme \[Ext.\]](#)

[Maintaining Sampling Procedure for Control Charts \[Ext.\]](#)

Creating a Sampling Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* and then *Sample* → *Sampling procedure* → *Create*.
2. On the initial screen for creating a sampling procedure, enter an identifier for the sampling procedure and choose *Sampling procedure*.



You can use an existing sampling procedure as a copy model. To do this, choose *Sampling procedure* → *Copy*. Then enter the name of the sampling procedure you want to copy and choose *Copy*. The system displays the assignments screen with the copied data, which you can change, if necessary.

The assignments screen appears, on which you can assign a sampling type and a valuation mode to the sampling procedure, select an inspection point and set the blocking indicator.

3. Enter data as required and choose *Continue*.

A screen appears, on which you can determine the following special conditions for the sampling procedure.

- **Sampling Scheme**

You must enter a sampling scheme if you specified a sampling type on the assignments screen that requires a sampling scheme.

- **Control Chart Type**

You need to enter a control chart type if you specified a fixed sample and a valuation mode that specifies a valuation on the basis of action limits.

- **Inspection Stage Change**

By setting the indicator *No stage change* you can prevent an inspection stage change from taking place. This means that the sample size will not be dynamically modified.

- **Multiple Samples**

If you want to use a sampling procedure without [independent \[Page 103\]](#) or [dependent \[Page 104\]](#) multiple samples, set the corresponding indicator.

If you want to work with independent or dependent multiple samples, you enter an additional valuation rule that combines the characteristic valuations for individual samples as a collective valuation, and the required number of samples (only for independent multiple samples).



If only one valid valuation rule was defined in [Customizing \[Ext.\]](#), the system proposes this valuation rule automatically.

Dependent multiple samples are only possible if you specified the sampling type *Use sampling scheme*.

- **Additional Data for the Sampling Scheme**

Creating a Sampling Procedure

If you use a sampling scheme, enter the inspection severity or the inspection severity and the AQL value.

– Sample Data

If you chose a fixed sample and an attributive inspection for the valuation mode, enter the sample size and the acceptance number.

If you chose a fixed sample and a variable inspection for the valuation mode, enter the sample size and the k-factor.

If you chose a fixed sample without valuation parameters, enter the sample size.

If you chose a fixed sample and an attributive inspection for the valuation mode, enter the sample size and the acceptance number.

If you chose a fixed sample without valuation parameters, enter the sample size.

If you set the *Free inspection points* indicator on the assignments screen, you must also enter the inspection frequency.



For example, you have activated quantity- based inspection points and want to inspect after each 300 pieces. If you enter the inspection frequency **2** in the sampling procedure for a characteristic, you must carry out an inspection after every second inspection point. The sampling procedure for the next characteristic may require an inspection for each inspection point.

4. Save the sampling procedure.

Once you have saved the data, if you want to create a [sampling procedure with sampling scheme \[Ext.\]](#), you can switch directly between the function for [maintaining allowed relationships \[Ext.\]](#) and sampling procedures and [dynamic modification rules \[Ext.\]](#). Using this function, you define which combinations of sampling procedures and dynamic modification rules are compatible and can be used together in an inspection plan or for an inspection type (for sample determination and/or dynamic modification without a task list).

If you do not include the sampling procedure in the allowed relationships table, the system returns you to the initial screen and confirms that the sampling procedure was created.

See also:

[Maintaining Sampling Procedure for Control Charts \[Ext.\]](#)

Valuation Mode

The valuation mode, together with the sampling type, defines which parameters the system uses to determine a sample size. The valuation mode specifies the rules for accepting and rejecting a characteristic or sample (for example, attributive inspection on the basis of nonconforming units, variable inspection according to s-method, and SPC inspection).



You can define additional valuation modes and valuation rules in [Customizing \[Ext.\]](#).

In an **attributive inspection**, the number of defects or number of nonconforming units in a sample are determined. When you inspect each characteristic, the system compares the number of defects or nonconforming units to the acceptance number for each characteristic. If the number of defects or nonconforming units does not exceed the acceptance number, the characteristic is accepted. In an attributive inspection, you inspect **qualitative inspection characteristics**.

In order to have a **variable inspection**, at least one specification limit must be defined in the inspection plan for the relevant quantitative characteristic. In a variable inspection, you inspect **quantitative characteristics**.

Inspection Points in the Sampling Procedure

Inspection Points in the Sampling Procedure

Use

By defining the inspection point type in the sampling procedure, you specify whether the system is to create inspection points for an inspection lot, and if so, how many are to be created. You can choose from the following inspection point types:

- You choose *Without insp. points* for sample determination without inspection points (for example, sample determination without an inspection plan or sample determination for an inspection lot with an inspection plan, in which no inspection points are specified) In this case, no inspection points are generated.
- You choose *Free inspection pts* for sample determination for inspection lots during production, for which you freely define an inspection point.
- You choose *Plant maintenance* if the sampling procedure is used in a task list in Plant Maintenance and if an inspection point is created for all items of equipment corresponding to the inspection lot quantity. In this case, you do not need to enter an inspection frequency.
- You choose *Sample management*, if you use the sampling procedure in a task list with which you want to inspect physical samples (for example, you have defined an inspection point for the inspection point type *Physical sample* in the task list header). In this case, you do not need to enter an inspection frequency.

Integration

In task lists that support an inspection with inspection points, you can only use sampling procedures, for which the corresponding indicator is set. You have the following options:

Task List Type Used	Inspection Point Types in the Sampling Procedure
Inspection plans	<ul style="list-style-type: none"> • Without inspection points • Free inspection points • Inspection points for sample management
Routings	<ul style="list-style-type: none"> • Free inspection points • Inspection points for sample management
Master recipes	<ul style="list-style-type: none"> • Free inspection points • Inspection points for sample management
Maintenance task list	<ul style="list-style-type: none"> • Inspection points for plant maintenance

Independent Multiple Samples

Use

When you set the indicator for independent multiple sampling, you define an additional valuation rule for independent multiple sampling in the sampling procedure. If you have specified this additional valuation rule, you can record inspection results for individual samples (that is, each sample is valued separately). The valuation type is defined in the valuation mode, using a valuation rule. Once the individual samples have been valued, the characteristic is valued using the valuation rule for multiple samples, which is assigned to the sampling procedure.

Prerequisites

You can only use independent multiple samples if you:

- Did not specify inspection points in your task list
- Did not specify a 100% inspection
- Specified a valuation mode without valuation parameters

Activities

To process independent multiple samples, proceed as follows:

- Set the indicator for independent multiple samples.
- In the dialog box for the sample, specify data for the sampling plan.
- Choose an identifier and short text for the valuation rule for independent multiple samples predefined in Customizing.

If you defined more than one valuation rule in [Customizing \[Ext.\]](#), a dialog box appears that displays all the existing valuation rules. From this list, you select one valuation rule.

If only one valuation rule exists, the system automatically assigns this valuation rule.

- Define the number of independent multiple samples.
- You save your data.

Dependent Multiple Samples

Dependent Multiple Samples

Use

Using this function, you can process double sampling inspections and multiple sampling inspections (up to seven samples) according to DIN 2859, part 1.

If you set the indicator for dependent multiple samples, you define an additional valuation rule for dependent multiple samples in the sampling procedure. The type of valuation is stored in the valuation mode, using a valuation rule. Once the dependent multiple samples have been valued, the characteristic is valued using the valuation rule for dependent multiple samples, which is assigned to the sampling procedure.

Integration

When you value the inspection results of dependent multiple samples, you have the following options:

- The sample is accepted immediately.
- The sample is rejected immediately.
- A clear valuation of the sample cannot be made because the number of nonconforming units or number of defects in the sample is higher than the acceptance number and lower than the rejection number.

In this case, the system uses the assigned sampling scheme to determine the next sampling plan and displays this in a dialog box. In the dialog box, you can manually value the sample or take the new sampling plan as a basis for a new valuation of the sample. The sample size and the number of nonconforming units cumulate when dependent multiple samples are processed.

Prerequisites

You can only use dependent multiple samples if you:

- Did not specify inspection points in your task list
- Specified a sampling type with a sampling scheme
- Specified a valuation mode for an attributive inspection
- Defined the function module for valuating dependent multiple samples in the valuation rule for dependent multiple samples in [Customizing \[Ext.\]](#)
- Set the indicator *Dependent multiple samples* in [Customizing \[Ext.\]](#)

Activities

To process dependent multiple samples, proceed as follows:

- Set the indicator for dependent multiple samples.
- In the dialog box for the sample, specify data for the sampling plan.
- Choose an identifier and short text for the valuation rule for dependent multiple samples predefined in Customizing.

Dependent Multiple Samples

If you defined more than one valuation rule in [Customizing \[Ext.\]](#), a dialog box appears that displays all the existing valuation rules. From this list, you select one valuation rule.

If only one valuation rule exists, the system automatically assigns this valuation rule.



The number of dependent multiple samples is specified by the respective sampling plan of the assigned sampling scheme.

Editing Sampling Procedures

Editing Sampling Procedures

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* and then *Sample* → *Sampling procedure* → *Change*.
2. On the initial screen for changing the sampling procedure, enter the identifier of the sampling procedure that you want to change or delete and choose *Sampling procedure*.



On the initial screen, by choosing *Display change logs*, you can display the change history for all existing sampling procedures. To do this, you must have set the parameter *rec/client* in Customizing.

3. On the assignments screen, make the required changes and choose *Continue*.



To delete the sampling procedure, choose *Sampling procedure* → *Delete* and confirm the deletion.

- You can delete a sampling procedure on the assignments screen and on the special conditions screen.
- You cannot delete a sampling procedure if it is currently being used. (That is, if the system has set the indicator *Use in insp. plan* on the assignments screen).

By choosing *Administrative data* on the assignments screen, you can display when the sampling procedure was created and changed.

4. On the special conditions screen, make the required changes and save your data.

The system returns to the initial screen and confirms that the sampling procedure was changed or deleted.

See also:

[Sampling Procedure with Percentage Sample \[Ext.\]](#)

[Sampling Procedure with Fixed Sample \[Ext.\]](#)

[Sampling Procedure with Sampling Scheme \[Ext.\]](#)

[Sampling Scheme \[Page 113\]](#)

[Dynamic Modification Rule \[Ext.\]](#)

Displaying the Use of Sampling Procedures

Use

Sampling procedures can be referenced in task lists, material specifications and in the inspection setup. The where-used list displays the task lists, material specifications and inspection setup, in which a sampling procedure is used.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Sample* → *Sampling procedure* → *Where-used list*
2. On the initial screen, enter the sampling procedure.



Use the various selection options to limit your search and improve system performance.

3. Choose *Usage*.

If the sampling procedure is used in at least one task list, material specification or inspection setup, a usage overview appears which displays the following data:

- Name of the sampling procedure
- Key date
- Total number of times used, as well as the number of uses in task lists, material specifications and the inspection setup
- Task list
- Operation number
- Characteristic number and characteristic description
- Master inspection characteristic
- Dynamic modification rule



The data displayed corresponds to the usage overview that is currently selected (highlighted in color).

You can switch between the overview screens for the usage of sampling procedures in task lists, material specifications or the inspection setup by clicking hotspots.

There are different lists for the entries in the usage overview.

4. You can call up other functions from the usage overviews:

Overview	Function	Menu Path/Pushbutton
Task lists	Displaying usage for other sampling procedure	<i>Sampling procedure</i> → <i>Other sampling procedure</i>

Displaying the Use of Sampling Procedures

	Replacing sampling procedure	<i>Sampling procedure</i> → <i>Replacement initial screen</i>
	Printing list	<i>Sampling procedure</i> → <i>Print</i>
	Downloading	<i>Sampling procedure</i> → <i>Download</i>
	Displaying sampling procedure	<i>Display sampling procedure</i> pushbutton
	Displaying task list data	<i>Display task list data</i> pushbutton
	Displaying usage in material specification	Hotspot
	Displaying usage in inspection setup	Hotspot
	Displaying a task list characteristic	Hotspot in table
	Displaying master inspection characteristic	Hotspot in table
	Displaying dynamic modification rule	Hotspot in table
Material specification	Displaying usage for other sampling procedure	<i>Sampling procedure</i> → <i>Other sampling procedure</i>
	Printing list	<i>Sampling procedure</i> → <i>Print</i>
	Downloading	<i>Sampling procedure</i> → <i>Download</i>
	Displaying sampling procedure	<i>Display sampling procedure</i> pushbutton
	Displaying material specification	<i>Display material specification</i> pushbutton
	Displaying master inspection characteristic	<i>Display master inspection characteristic</i> pushbutton
	Displaying usage in task lists	Hotspot
	Displaying usage in inspection setup	Hotspot
Inspection setup	Displaying usage for other sampling procedure	<i>Sampling procedure</i> → <i>Other sampling procedure</i>
	Printing list	<i>Sampling procedure</i> → <i>Print</i>
	Downloading	<i>Sampling procedure</i> → <i>Download</i>
	Displaying inspection type	<i>Display certificate profile</i> pushbutton <i>Inspection Type</i>
	Displaying sampling procedure	<i>Display sampling procedure</i> pushbutton
	Displaying usage in task lists	Hotspot

Displaying the Use of Sampling Procedures

	Displaying usage in material specification	Hotspot
	Displaying dynamic modification rule	Hotspot in table

Replacing Sampling Procedure

Replacing Sampling Procedure

Use

In the *Quality Management* application component, you can replace a sampling procedure that is used in task lists.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Sample* → *Sampling procedure* → *Replace*
2. On the initial screen, enter the sampling procedure to be replaced (*Sampling procedure*) and the new sampling procedure (*New sampling procedure*). If necessary, use the input help.



Use the various selection options (task list, material and material specification) to limit your search and improve system performance.

3. Enter the required change key date, from which you want the replacement to take effect.



If you enter a change number, the date of this number is the key date, from which the replacement applies.

4. Choose *Usage*.

If the sampling procedure is used in at least one task list, the system displays a list of all task lists in which the sampling procedure to be replaced is used. The operation number, characteristic number and characteristic description, as well as a master inspection characteristic and a dynamic modification rule (if they exist), are given for each task list.

5. Select the task lists, in which you want to replace the sampling procedure.
6. Define the [replacement mode \[Ext.\]](#) (optional).
7. Choose *Start*.



If you have not already defined the replacement mode, a dialog box appears, in which you can specify this mode.

8. To determine if the replacement was successful, check the [replacement log \[Ext.\]](#) (created automatically after the replacement is carried out).
9. You can call up other functions from the usage overviews:

Overview	Function	Menu Path/Pushbutton
Task lists	Displaying usage for other sampling procedure	<i>Sampling procedure</i> → <i>Other sampling procedure</i>
	Displaying usage for other sampling procedure	<i>Sampling procedure</i> → <i>Usage initial screen</i>

Replacing Sampling Procedure

	Printing list	<i>Sampling procedure → Print</i>
	Downloading	<i>Sampling procedure → Download</i>
	Displaying change number	<i>Extras → Display change number</i>
	Displaying sampling procedure	<i>Display sampling procedure pushbutton</i>
	Displaying task list data	<i>Display task list data pushbutton</i>
	Entering replacement mode	<i>Settings pushbutton</i>
	Batch input	<i>Batch input pushbutton</i>
	Displaying usage in material specification	Hotspot
	Displaying usage in inspection setup	Hotspot
	Displaying a task list characteristic	Hotspot in table
	Displaying master inspection characteristic	Hotspot in table
	Displaying dynamic modification rule	Hotspot in table
Material specification	Displaying usage for other sampling procedure	<i>Sampling procedure → Other sampling procedure</i>
	Displaying usage for other sampling procedure	<i>Sampling procedure → Usage initial screen</i>
	Printing list	<i>Sampling procedure → Print</i>
	Downloading	<i>Sampling procedure → Download</i>
	Displaying sampling procedure	<i>Display sampling procedure pushbutton</i>
	Displaying material specification	<i>Display material specification pushbutton</i>
	Displaying master inspection characteristic	<i>Display master inspection characteristic pushbutton</i>
	Displaying usage in task lists	Hotspot
	Displaying usage in inspection setup	Hotspot
Inspection setup	Displaying usage for other sampling procedure	<i>Sampling procedure → Other sampling procedure</i>
	Displaying usage for other sampling procedure	<i>Sampling procedure → Usage initial screen</i>

Replacing Sampling Procedure

	Printing list	<i>Sampling procedure → Print</i>
	Downloading	<i>Sampling procedure → Download</i>
	Displaying inspection type	<i>Inspection type</i> pushbutton, hotspot in table
	Displaying sampling procedure	<i>Display sampling procedure</i> pushbutton
	Displaying usage in task lists	Hotspot
	Displaying usage in material specification	Hotspot
	Displaying dynamic modification rule	Hotspot in table

Sampling Scheme

Definition

A collection of [sampling plans \[Page 117\]](#). A sampling plan applies to the sample size based on a specific inspection lot quantity and defines the criteria for determining whether and how a sample is accepted or rejected. In the R/3 System, the structure of the sampling plans complies with international standards (for example ISO 2859 and ISO 3951). However, you can also add sampling schemes for different sampling procedures.

Use

You use a sampling scheme if you want to:

- Determine the sample size on the basis of the lot size, inspection severity, or combination of inspection severity and AQL (actual quality level)
- Store how a decision is made to accept or reject a characteristic
- Determine the number of physical samples, based on the lot size, or the number of containers in an inspection lot in [sample management \[Ext.\]](#)

Structure

Valuation Parameters

You can create sampling schemes:

- For attributive inspections
- For variable inspections based on the s-method
- Without valuation parameters, if you use the sampling scheme in a sample-drawing procedure or in a sampling procedure that calls for a sample calculation without a task list

Depending on the valuation parameter used, the sampling plan consists of:

- The sample size, acceptance number, and rejection number for **attributive inspections**
- The sample size and K-factor for **variable inspections**
- The sample size if **without valuation parameters** was specified

Sampling Tables

Depending on whether you work with an AQL value, the sampling scheme contains a sampling plan table (which is arranged according to the lot quantity) for each inspection severity or for each combination of inspection severity and AQL value.

AQL Value Maximum fraction of nonconforming units (as a percentage) or maximum number of defects per 100 units permitted for a lot to be accepted. AQL (Acceptable Quality Level): This is the quality level that represents the upper limit of a satisfactory average quality level for an acceptance sampling inspection.

Inspection Severity: In the QM component, the inspection severity serves as an identifier for a normal, reduced, or tightened inspection. By varying the inspection severity, you can flexibly adjust the probability of acceptance and the inspection effort, based on different quality situations. The inspection severity is closely connected to the inspection scope. If all other

Sampling Scheme

conditions remain the same, different inspection severities lead to different inspection scopes or acceptance conditions. You can only enter inspection severities that were defined in [Customizing \[Ext.\]](#).

Creating A Sampling Scheme

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Sample* → *Sampling scheme* → *Create*.
2. On the initial screen for creating a sampling scheme, enter an identifier for the sampling scheme and choose *Sampling scheme*.



You can use an existing sampling scheme as a copy model. To do this, choose *Sampling scheme* → *Copy*. Then enter the identifier of the sampling scheme you want to copy and choose *Copy*. The system displays the header data screen with the copied data, which you can change, if necessary.

The header data screen appears, where you can:

- Enter a short text for the sampling scheme
 - Specify the valuation parameter for the sampling inspection type, for which the sampling scheme is to be used.
 - Define whether the [sampling table \[Page 117\]](#) applies to an inspection severity only, or to a combination of inspection severity and AQL.
 - Set the blocking indicator to prevent the sampling scheme from being assigned to a sampling procedure.
3. Enter data as required and choose *Continue*.

A dialog box appears, in which you enter the inspection severities or the inspection severities with AQL values.

If	Then
The sampling scheme was created by copying an existing sampling scheme	Select an inspection severity or an inspection severity and an AQL value
The sampling scheme was created without copying an existing sampling scheme	Enter an inspection severity or an inspection severity and an AQL value



The inspection severity that you enter here is closely related to the inspection severity in the dynamic modification rule. Within the sample determination from the inspection lot, the current inspection severity is usually determined by means of the quality level and the dynamic modification rule. This inspection severity leads to the corresponding sampling plan in the sampling scheme.

In this field, you can only enter inspection severities that were defined in [Customizing \[Ext.\]](#).

4. Choose *Continue*.
5. On the screen for creating a sampling table, enter the following data:

For	You enter

Creating A Sampling Scheme

An attributive inspection	The lot size, the sample size, the acceptance number(s) c (optional) and the rejection number(s) d
A variable inspection	The lot size, the sample size, and the K-factor.
An inspection without valuation parameters	The lot size and the sample size



In addition to the acceptance and rejection numbers for the first sample, the sampling scheme contains fields for six additional samples with acceptance and rejection numbers for use in sampling procedures for [dependent multiple samples \[Page 104\]](#).

6. Save the sampling scheme.

See also:

[Sampling Scheme Without Valuation Parameters \[Page 121\]](#)

Sampling Plan

Definition

Includes the required information about the sample sizes and the criteria that are to be used to evaluate the results of the sampling inspection.

Use

Depending on whether you work with AQL values, the sampling scheme contains a sampling plan table (which is arranged according to the lot quantity) for each inspection severity or for each combination of inspection severity and AQL value.

Structure

Lot Size

The lot size gives the quantity of the population (measured in sample units) as an upper limit, up to which the relevant sampling plan applies.

In every table with sampling plans that you have created within a sampling scheme, also enter the largest possible lot size. If you enter a value that is greater than the maximum possible value, the entry is automatically reset to 10.000.000.000.

If you use a lot size to determine samples that is not taken into account in a sampling plan table, the sample size cannot be determined.

Sample Size

The sample size defines the quantity of units (calculated in sample units) taken from a population or subpopulation in order to be inspected.

Acceptability Constant

You use the acceptability constant (**k-factor**) in a sampling plan for a **variable inspection** to define the lowest value of the quality score in the samples, with which the sample is accepted. The acceptability constant for a variable inspection corresponds to the acceptance number for an attributive inspection.

Acceptance Number c

You use the acceptance number c in a sampling inspection for an **attributive inspection** to define the highest number of nonconforming units or defects found in the sample that still allows the lot to be accepted. The acceptance number in an attributive inspection corresponds to the acceptability constant in a variable inspection.



If you are working with dependent multiple samples, you enter a separate acceptance number for each individual sample.

Sampling Plan**Rejection Number d**

You use the rejection number d in a sampling inspection for an **attributive inspection** to define the lowest number of nonconforming units or defects found in the sample, with which the lot is rejected.



If you are working with dependent multiple samples, you enter a separate rejection number for each individual sample.

Editing a Sampling Scheme

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Basic data* → *Sample* → *Sampling scheme* → *Change*.
2. On the initial screen for changing the sampling scheme, enter the identifier of the sampling scheme that you want to change or delete and choose *Sampling scheme*.



On the initial screen, by choosing *Display change logs*, you can display the change history for all existing sampling schemes. To do this, you must have set the parameter *rec/client* in Customizing.

3. On the header data screen, make the required changes and choose *Continue*.

A dialog box appears, in which you can enter the inspection severities or the inspection severities with AQL values. If you use a [sampling scheme without valuation parameters \[Page 121\]](#), the screen for maintaining the sampling table appears.



By choosing *Administrative data* on the header data screen, you can display when the sampling scheme was created and changed.

To delete the sampling scheme, choose *Sampling scheme* → *Delete* and confirm the system prompt. You cannot delete a sampling scheme, if it is currently being used. (That is if the system has set the indicator *Used in procedure* on the assignments screen).

4. Make the required changes. You have two options:
 - Select an inspection severity or an inspection severity and an AQL value.
 - Enter an inspection severity or an inspection severity and an AQL value to create a new sampling table. If necessary, use a copy model.



In this field, you can only enter inspection severities that were defined in [Customizing \[Ext.\]](#).

5. Choose *Continue*.

The screen for editing a sampling table appears.

6. Make the required changes.



To delete a sampling table, select the sampling plan(s) you want to delete, choose *Delete*.

7. Save your data.

The system returns to the initial screen and confirms that the sampling scheme was changed or deleted.

See also:

Editing a Sampling Scheme

[Sampling Plan \[Page 117\]](#)

Sampling Scheme Without Valuation Parameters

Definition

Unlike all other sampling schemes, a sampling scheme without valuation parameters does not contain information about acceptance and rejection numbers or the k-factor for a characteristic.

Use

You use sampling schemes without valuation parameters to determine the sample size when you inspect without a task list in:

- Sample-drawing procedures:

A sampling scheme is used in a sample-drawing procedure, if the number of physical samples is determined on the basis of the inspection lot quantity (in the base unit of measure, or on the basis of the number of lot containers and the container type).

- Sampling procedures

If you want to determine the sample sizes on the basis of a sampling procedure in an inspection without an inspection plan, you must set the indicator *Without valuation parameters* in both the sampling procedure and the sampling scheme. This is because the valuation parameters are taken from the sampling scheme when it is assigned to a sampling procedure.

Structure

The sampling plan for inspection severity or inspection severity and AQL-value only contains information about the inspection lot quantity and sample size.

See also:

[Sample-Drawing Procedure \[Ext.\]](#)

[Sampling Procedure with Sampling Scheme \[Ext.\]](#)

QM-Specific Data in the Material Master (QM-PT-BD-MM)

QM-Specific Data in the Material Master (QM-PT-BD-MM)

Purpose

The Quality Management view of the material master primarily contains the control parameters you need to process quality inspections throughout the logistics supply chain. In the material master, you define various inspection parameters based on the inspection type (for example, triggering events for quality inspections, inspection with or without a task list, with or without a material specification and whether results are to be recorded for inspection characteristics). In addition, you enter the control data for [QM in Procurement \[Ext.\]](#) in the material master.



Almost all Quality Management data is maintained at the plant level. This allows you to control the QM processes for the different plants of a company in different ways. You can use mass-processing transactions to change the inspection setup for materials, activate and deactivate inspection types, as well as to distribute the [inspection setup \[Page 127\]](#) in several systems.

Integration

QM-specific data in the material master plays a part in:

- Managing quality information for materials, vendors and manufacturers
- Certifying vendors and manufacturers, as well as monitoring their QM systems
- Managing the release status of supply relationships, for example, for model or regular deliveries
- Evaluating vendors from a quality standpoint, using statistics from audits, goods receipt inspections and problem notifications
- Transferring quality documents, for example, technical delivery terms for requests for quotations and purchase orders
- Requesting quality certificates and monitoring certificate receipt
- Triggering source inspections at the vendor's premises before the scheduled delivery date
- Inspections for goods movements, such as goods receipts
- Blocking payments until inspection lots are accepted
- Managing stock that is subject to a quality inspection and taking into account inspection lots in material requirements planning
- Transferring inspection results to the batch classification
- Determining batches using inspection results from quality inspections
- Monitoring batches with regard to their expiration date and the date for recurring inspections
- Managing problems using quality notifications; processing complaints against a vendor

QM-Specific Data in the Material Master (QM-PT-BD-MM)**Features**

The information in the material master controls the quality management processes throughout the logistics supply chain. You use the QM-specific data in the material master to control the quality inspection process and to define whether a material is to be posted to inspection stock. The material itself serves as the reference object for the quality inspection, quality certificates, and quality notifications.

To control QM activities, you can, for example, define the following:

- **Procurement data**
 - Procurement control key
 - Certificate type
 - Requirements for the vendor's QM system
 - Technical delivery terms
- **Display inspection setup**
 - Inspection type
 - Use of a task list or material specification
 - Results recording for characteristics
 - Quality score procedure
 - Sample determination

See also:

[Material Master \[Ext.\]](#)

Creating and Changing QM Data for a Material

Creating and Changing QM Data for a Material

Use

You require QM-specific data for a material, if you want to use the *Quality Management (QM)* application component during procurement and inspection activities.

Procedure

1. Proceed as follows:

To	Choose	On the initial screen, enter the following data:
Create new QM-specific data for a material	Choose <i>Logistics</i> → <i>Quality management</i> → <i>Quality planning</i> → <i>Logistics master data</i> → <i>Material</i> → <i>Create</i>	<ul style="list-style-type: none"> • Material (optional) If you do not enter a material, the system automatically assigns a material number from a predefined number range. • Industry sector • Material type • Copy from... (optional)
Change QM-specific data for a material	Choose <i>Logistics</i> → <i>Quality management</i> → <i>Quality planning</i> → <i>Logistics master data</i> → <i>Material</i> → <i>Change</i>	<ul style="list-style-type: none"> • Material • Change number (optional)
Display QM-specific data for a material	Choose <i>Logistics</i> → <i>Quality management</i> → <i>Quality planning</i> → <i>Logistics master data</i> → <i>Material</i> → <i>Display</i>	<ul style="list-style-type: none"> • Material

2. Choose *Continue*.
3. In the dialog box for selecting a view, set the *Quality Management* indicator and choose *Continue*.
4. On the *Organizational Levels* screen, enter the required plant and then choose *Continue*.
The Quality Management view of the material master appears.
5. Enter a short text for the material and the base unit of measure.



If you have already entered this data in another view for the material (for example, in the purchasing view), the system copies over the entered data.

6. If necessary, enter the following additional information:

Field/Indicator in General Data Screen Section	What You Should Know

Creating and Changing QM Data for a Material

<i>Unit of issue</i>	You can define the unit of measure that can be used for the withdrawal of a material from the warehouse, stock transfers and transfer postings.
<i>QM material auth.</i>	You use this key to limit the access authorization of users to the material-related data in Quality Management. If you do not enter an authorization group, no authorization check is made by the system.
<i>GR processing time</i>	You can enter the number of working days that are needed to inspect the material and place it in storage, once the goods have been received. From a QM standpoint, this field is for information only.
<i>Catalog profile</i>	You can assign a catalog profile to the material. This profile is then proposed as the default when you create a quality notification or record defects.
<i>Plant-sp. matl status</i>	You use this plant-specific material status to limit the use of the material to the relevant plant.
<i>Inspection setup</i>	If you activate at least one inspection type in the inspection setup for a material, the system sets this indicator.
<i>Post to insp. stock indicator</i>	If you set this indicator, the material is posted to inspection stock at goods receipt. If you do not set this indicator, the goods receipt is posted to unrestricted-use stock. This field is hidden if at least one inspection type relevant to stock is active. In this case, you control whether the material is posted to inspection stock using the corresponding indicator in the inspection type.
<i>Documentation reqd</i>	You set this indicator, if you want to record any changes made to inspection lots that were created for the material in change documents.
<i>Inspection interval</i>	In this field you enter the period of time in days until the next recurring inspection is to take place. This field only applies to materials that are to be handled in batches.
<i>Valid from</i>	You enter the date, from which the plant-specific material status is valid.
Field/Indicator in Procurement Data Screen Section	What You Should Know

Creating and Changing QM Data for a Material

<i>QM procurement active</i>	If you set this indicator, you activate Quality Management in procurement for all plants in a client.
<i>QM control key</i>	You use this key (defined in Customizing [Ext.]) to control the conditions that apply to the quality management processes in procurement. You must enter additional information, depending on the control key.
<i>Certificate type</i>	You must enter a certificate type if you have selected a control key that requires a certificate type. The certificate type represents the content of a certificate.
<i>Target QM system</i>	With the key that you enter in this field, you (as a customer in a delivery relationship) define the requirements for the vendor's QM system [Page 135] .
<i>Tech. delivery terms</i>	This indicator is set automatically, if technical delivery terms are assigned to a material. You must assign technical delivery terms to a material, by choosing the corresponding control key.

9. Edit the [inspection setup \[Page 127\]](#) and choose *Continue*.

10. Save your data.

See also:

[QM in Procurement \[Ext.\]](#)

[Request for Quotation and Quotation \[Ext.\]](#)

[Quality Certificates \[Ext.\]](#)

Editing the Inspection Setup

Use

You must edit the inspection setup, to be able to create inspection lots for a material. Inspection lots are created for all goods movements that are relevant to QM. In the material master, you define which goods movements are relevant to QM.

In QM, you can plan an inspection and prepare all materials at this stage. You can assign suitable [inspection types \[Ext.\]](#) to each material and can edit the inspection setup. However, you do not set the *Active* indicator at this stage. When you save the material, the data is assigned to the material. However, no inspection lots can be created at this stage. This only occurs, when you activate the inspection type in the inspection setup.



If you change the inspection setup, this does not affect existing inspection lots. Only newly created inspection lots are affected by this change.

The system contains a report that you can use to [activate an inspection type \[Page 136\] \[Page 136\]](#). This program allows you to activate the inspection type for all materials.

Prerequisites

You must make various settings in [Customizing for inspection types \[Ext.\]](#).

Procedure

1. In the Quality Management view of the material master, choose *Inspection setup*.
2. On the screen for editing the inspection setup, choose *Create inspection types* and enter the inspection types. If necessary, use the input help.

By entering one or more inspection types, you define which inspections the material has to undergo, depending on the goods movements and how you are to inspect.



To activate a combination of inspection type and material for QM, you must set the corresponding indicator; only then is it possible to create inspection lots.

Note that there must not be any inspection stock for the material, when the first stock-relevant inspection type is activated. Otherwise, you must create an inspection lot for the inspection stock – the system takes the inspection type for this lot from [Customizing \[Ext.\] \[Ext.\]](#).

If you want the system to use an inspection type other than the one that is specified in Customizing under variant 01, you must set the *Preferred InsTyp* indicator.

3. Choose *Check*, to check the data you have entered and to display details of the chosen inspection type.

Editing the Inspection Setup



You use these details to influence the processing of the material during inspection processing and results recording.

For each inspection type, you can predefine a number of indicators and field values in [Customizing \[Ext.\] \[Ext.\]](#). The system proposes these settings as default values in the inspection setup, but they can be changed.

4. If necessary, edit the following indicators and fields in the inspection type:

Indicator/Field	What You Should Know
<i>Post to insp.</i> stock indicator	When a goods movement takes place, the quantity of the material to be posted is posted to inspection stock. If you do not set this indicator, the material quantity is posted to unrestricted-use stock.
<i>Insp. with mat. spec</i> indicator	The inspection is carried out according to the material specification. A material specification must have been created for this material, when an inspection lot is created (at the latest).
<i>Insp. with task list</i> indicator	The inspection is carried out according to the material specification. A task list must have been created for this material, when an inspection lot is created (at the latest).
<i>Insp. by configuratn.</i> indicator	When inspection lots are created, the system takes into account the configuration from the sales or production order. The inspection specifications from the task list or the material specification are supplemented or changed.
<i>Inspect by batch</i> indicator	When inspection lots are created, the system takes into account the specifications that have been defined in batch determination. These specifications have precedence over those from the material specification or task list.
<i>Automatic assignment</i> indicator	The system assigns an inspection plan or a material specification automatically, so that the inspection lot can be made available without any further processing, (for example, without recording results). You can only set this indicator in conjunction with the <i>Insp. with task list</i> or <i>Insp. with mat spec.</i> indicator. The <i>Manual sample calc.</i> indicator should, however, not be set.
<i>Insp. by charac.</i> indicator	Results recording based on characteristics takes place. This is a prerequisite for dynamic modification based on characteristics. You can only set this indicator in conjunction with the <i>Insp. with task list</i> or <i>Insp. with mat. spec.</i> indicator.
<i>Smpl. procedure</i> field	Sampling procedure, according to which the sample size is to be calculated from the lot quantity. In addition, the sampling procedure defines the type of valuation that is used to record results. This field is only relevant for an inspection without a task list or material specification.
<i>100% inspection</i> indicator	An inspection of the whole inspection lot takes place.

Editing the Inspection Setup

<i>Inspection %</i> field	Percentage, according to which the total sample size is to be calculated from the lot quantity. This field is only relevant for an inspection without a task list or material specification.
<i>Manual sample calc.</i> indicator	You must trigger the sample calculation in the inspection lot manually. You can only set this indicator in conjunction with the <i>Automatic assignment</i> indicator.
<i>Manual sample entry</i> indicator	You must manually enter the sample size in the inspection lot. You cannot set this indicator in conjunction with the <i>Insp. with mat. spec.</i> indicator or the <i>Insp.with task list</i> indicator.
<i>Dyn. mod. rule</i> indicator	The dynamic modification rule defines inspection stages and the conditions that lead to an inspection stage change.
<i>Skips allowed</i> indicator	The system allows characteristics to be skipped, when the sample size is calculated. If you do not set this indicator, at dynamic modification, the system chooses the next inspection stage that is not a skip.
<i>Automatic UD</i> indicator	The system can automatically make usage decisions for inspection lots, if the corresponding program is run.
<i>Single-unit insp.</i> indicator	A single-unit inspection using serial numbers is activated for the inspection lot, provided that the material has been identified by a serial number profile as requiring serial numbers.
<i>Avg. insp. duration</i> field	You enter the average inspection duration in days. The start or end date for the inspection is then calculated at inspection lot creation using the start or end date and the inspection duration.
<i>Q-score procedure</i> field	Quality score procedure, according to which the quality score is calculated.
<i>Allowed scrap share</i> field	Allowable share of scrap for the quality score procedures that use the share of scrap to calculate the quality score.
<i>Control insLot</i> field	You enter the conditions, under which a single inspection lot is to be created.
<i>QM individual order</i> indicator	You can record appraisal costs for the combination material/inspection type in an individual QM order.
<i>QM order</i> indicator	Number of the QM order, in which the costs are to be collected. When the inspection lot is created, this information is copied into the inspection lot record, provided that no individual QM order has been created.

5. To check the consistency of your data, choose *Check again*.
6. If the entries are consistent, choose *Continue*.

The Quality Management view of the material master reappears.

7. Save your data.

See also:

Editing the Inspection Setup

[Making Mass Changes to the Inspection Setup \[Page 140\]](#)

[Editing the Inspection Setup Individually \[Page 138\]](#)

[Determining the Inspection Type for Automatically Created Lots \[Ext.\]](#)

Inspection Without a Task List or Material Specification

Inspection Without a Task List or Material Specification

If you want to inspect by batch or according to configuration, but you do not want to use a task list or material specification, you must make entries in the inspection type fields and for the indicators as follows:

Indicators/Fields to be Set

- *Allowed scrap share*
- *Q-score procedure*
 In this field, enter a procedure that copies the quality score from the usage decision code.

Optional Indicators/Fields

- *Manual sample calc.*
- *Manual sample entry*
- *Inspection %*
- *100% inspection*

The following table provides an overview of the effects of the different settings.

Set Indicators	What You Should Know
<i>Manual sample calc.</i> <i>Manual sample entry</i>	You must enter the sample size manually
<i>Manual sample calc.</i> <i>Inspection %</i>	You must trigger the sample calculation manually. The system calculates the sample size according to the inspection percentage you entered.
<i>Manual sample calc.</i> <i>100% inspection</i>	You must trigger the sample calculation manually. The entire inspection lot is inspected.

- *Avg. insp. duration*
 If you enter an inspection duration, the system automatically calculates the planned start time or the planned end time of the inspection for the inspection lot.
- *Smpl. procedure*
 If you enter a sampling procedure, the system calculates the sample size from the lot size, according to this sampling procedure. In addition, the sampling procedure defines the type of valuation that is used to record results.
- *Dyn. mod. rule*

Indicators/Fields Not to be Set

- *Insp. with task list*
- *Insp. by charac.*
- *Skips allowed*

Inspection Without a Task List or Material Specification

See also:

[Inspection with Task List and/or Material Specification \[Page 133\]](#)

Inspection with Task List and/or Material Specification

If you want to inspect with a task list, material specification, by batch or according to configuration, you must make entries in the inspection type fields and for the indicators as follows:

Indicators/Fields to be Set

- *Insp. with task list*
- *Insp. with mat. spec.*
- *Insp. by configuratn*
- *Insp. by batch*
- *Q-score procedure*
- *Allowed scrap share*

Optional Indicators/Fields

The following indicators are optional, depending on which inspection type you select and how you want to record the inspection results.

- *Automatic assignment*
- *Insp. by charac.*

If you want to inspect with a task list, without recording results by characteristic, you must **not** set the *Insp. by charac.* indicator. In this case, you can make shop papers available to the inspector in the form of an inspection instruction, containing a list of inspection characteristics.

- *100% inspection*
- *Dyn. mod. rule*
- *Skips allowed*
- *Manual sample calc.*
- *Avg. insp. duration*

When an inspection lot is created, you can enter the planned start date of the inspection. The system then calculates the planned end date of the inspection (or vice versa).

Indicators/Fields Not to be Set

- *Manual sample entry*
- *Inspection %*

See also:

[Inspection Without a Task List or Material Specification \[Page 131\]](#)

Inspection with Task List and/or Material Specification

Vendor Quality Management System

Some companies - in particular, government agencies and large corporations - require their vendors to verify that an appropriate quality management system is documented, implemented and in use within their organization.

Ever since the ISO 9000 series of standards received general recognition, many companies have obtained ISO 9000 certificates from accredited organizations. The scope and requirements of quality management systems, however, vary according to the needs of individual companies. As a result, many different models and requirements exist for verification management systems. However, many of these requirements apply only to certain parts of the quality management system and are therefore covered by the certificates. You must determine whether the specifications of the quality management system fulfill the certification requirements on a case-by-case basis.



A customer requests a vendor to verify that his quality management system complies with the AQAP-4 standard. The vendor has a certificate confirming that his quality management system is certified according to the ISO 9001 standard. A comparison in this case reveals that both systems are equivalent.

Activating or Deactivating Inspection Types

Activating or Deactivating Inspection Types

Prerequisites

- You must have edited the [QM-specific data \[Page 124\]](#) in the Quality Management view of the material master.
- You can activate an [inspection type \[Ext.\]](#) under the following conditions:
 - If it is not stock-relevant
 - If it is stock-relevant and at least one active stock-relevant inspection type exists
 - If it is the first stock-relevant inspection type and no inspection stock exists, or if you set the indicator *Activate despite insp. stock*
- When you deactivate the last inspection type relevant to stock, there must be no inspection stock for the material. To do this you must post the inspection lot quantities out of the inspection stock.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Logistics master data* → *Material* → *Inspection setup*
2. Choose *Activate insp. type* or *Deactivate insp. type*.
3. Select the materials, for which you want to activate or deactivate the inspection type. You can make the selection by using the plant, material, the material type and the material class.
4. Enter the required inspection type.
5. Edit the following indicators:

Indicator	What You Should Know
<i>Assign inspection type</i> (only in the activation function)	<p>If you set this indicator, the system activates the inspection type in the materials, and adds it to those materials, to which the type was not previously assigned.</p> <p>If the inspection type did not exist, the system copies the parameters that are defined in Customizing as default values for the inspection type.</p>
<i>Activate despite insp. stock</i> (only in the activation function)	<p>If you set this indicator, inspection lots are created automatically, when you activate the first stock-relevant inspection type, to avoid stock inconsistencies between QM and MM. The inspection type for the inspection lots to be created is taken from Customizing [Ext.].</p> <p>If you do not set this indicator, the inspection type for a material is only activated, if no stock inconsistencies will occur between QM and MM without the creation of additional inspection lots.</p>

Activating or Deactivating Inspection Types

<i>Do not display material list</i>	<p>If you set this indicator, the system immediately activates the inspection type for all selected materials, when the program is run.</p> <p>If you do not set this indicator, the system displays a list of materials. From this list, you can select the materials, for which you want to activate the inspection type.</p>
<i>Create change documents</i>	<p>If you set this indicator, change documents are created for all changes that are made to the materials. You can display these change documents in the material master record.</p> <p>If you want to distribute inspection setup data via ALE, using change documents [Page 146], you must set this indicator. This ensures that all changes to the inspection setup are distributed in other systems.</p>

6. Choose *Execute*.

If you set the *Do not display material list* indicator, the chosen inspection type is activated immediately for all selected materials.

7. If you do not set the *Do not display material list* indicator, select the materials from the list, for which you want to activate or deactivate the inspection type and choose *Continue*.

8. Save the data.

Additional Functions in the Selection List for Mass Change

Function	Pushbutton	What You Should Know
Display inspection setup	<i>Display inspection setup</i>	You switch to the inspection setup in the Quality Management view of the material master.
Display stock overview	<i>Stock</i>	You switch to the stock overview for the chosen material.

Editing Inspection Setup Data Individually

Editing Inspection Setup Data Individually

Prerequisites

- You must have edited the [QM-specific data \[Page 124\]](#) in the Quality Management view of the material master.
- You can activate an [inspection type \[Ext.\]](#) under the following conditions:
 - If it is not stock-relevant
 - If it is stock-relevant and at least one active stock-relevant inspection type exists
 - If it is the first stock-relevant inspection type and no inspection stock exists, or if you set the indicator *Activate despite insp. stock*
- When you deactivate the last inspection type relevant to stock, there must be no inspection stock for the material. To do this you must post the inspection lot quantities out of the inspection stock.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Logistics master data* → *Material* → *Inspection setup*
2. Choose *Inspection setup, Individual processing*.
3. Select the materials you want to process. You can make the selection by using the plant, material, the material type and the material class.
4. Edit the following indicators:

Indicator	What You Should Know
<i>Activate despite insp. stock</i>	<p>If you set this indicator, inspection lots are created automatically, when you activate the first stock-relevant inspection type, to avoid stock inconsistencies between QM and MM. The inspection type for the inspection lots to be created is taken from Customizing [Ext.].</p> <p>If you do not set this indicator, the inspection type for a material is only activated, if no stock inconsistencies will occur between QM and MM without the creation of additional inspection lots.</p>
<i>Create change documents</i>	<p>If you set this indicator, change documents are created for all changes that are made to the materials. You can display these change documents in the material master record.</p> <p>If you want to distribute inspection setup data via ALE, using change documents [Page 146], you must set this indicator. This ensures that all changes to the inspection setup are distributed in other systems.</p>

5. Choose *Execute*.
6. From the list, select the material that you want to edit.
7. Choose *Edit inspection setup data*.

Editing Inspection Setup Data Individually

The screen for editing the inspection setup appears.

8. Make the required changes.
9. Save your data.

Additional Functions in the Selection List for Mass Change

Function	Pushbutton	What You Should Know
Display inspection setup	<i>Display inspection setup</i>	You switch to the inspection setup in the Quality Management view of the material master.
Display stock overview	<i>Stock</i>	You switch to the stock overview for the chosen material.

Making Mass Changes to the Inspection Setup

Making Mass Changes to the Inspection Setup

Prerequisites

- You must have edited the [QM-specific data \[Page 124\]](#) in the Quality Management view of the material master.
- You can activate an [inspection type \[Ext.\]](#) under the following conditions:
 - If it is not stock-relevant
 - If it is stock-relevant and at least one active stock-relevant inspection type exists
 - If it is the first stock-relevant inspection type and no inspection stock exists, or if you set the indicator *Activate despite insp. stock*
- When you deactivate the last inspection type relevant to stock, there must be no inspection stock for the material. To do this you must post the inspection lot quantities out of the inspection stock.

Procedure

1. Choose *Logistics* → *Quality management* → *Quality planning* → *Logistics master data* → *Material* → *Inspection setup*
2. Choose *Inspection setup, Mass processing*
3. Select the materials you want to process. You can make the selection by using the plant, material, the material type and the material class.
4. Enter the required inspection type.
5. Edit the following indicators:

Indicator	What You Should Know
<i>Activate despite insp. stock</i> (only in the activation function)	<p>If you set this indicator, inspection lots are created automatically, when you activate the first stock-relevant inspection type, to avoid stock inconsistencies between QM and MM. The inspection type is taken from Customizing [Ext.].</p> <p>If you do not set this indicator, the inspection type for a material is only activated, if no stock inconsistencies will occur between QM and MM without the creation of additional inspection lots.</p>
<i>Do not display material list</i>	<p>If you set this indicator, the system immediately activates the inspection type for all selected materials, when the program is run.</p> <p>If you do not set this indicator, the system displays a list of materials. From this list, you can select the materials, for which you want to activate the inspection type.</p>

Making Mass Changes to the Inspection Setup

<p><i>Create change documents</i></p>	<p>If you set this indicator, change documents are created for all changes that are made to the materials. You can display these change documents in the material master record.</p> <p>If you want to distribute inspection setup data via ALE, using change documents [Page 146], you must set this indicator. This ensures that all changes to the inspection setup are distributed in other systems.</p>
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6. Choose *Execute*.

The screen for editing the inspection setup parameters in the material master is displayed.

7. Edit the indicators and field entries and choose *Continue*.

If you set the *Do not display material list* indicator, the data for the chosen inspection type is changed immediately for all selected materials.

8. If you did **not** set the *Do not display material list* indicator, select the materials from the list, for which you want to change the inspection type and choose *Continue*.

9. Save your data.

Additional Functions in the Selection List for Mass Change

Function	Pushbutton	What You Should Know
Display inspection setup	<i>Display inspection setup</i>	You switch to the inspection setup in the Quality Management view of the material master.
Display stock overview	<i>Stock</i>	You switch to the stock overview for the chosen material.

Distribution of Inspection Setup Using ALE

Distribution of Inspection Setup Using ALE

Use

The QM application component enables you to a great extent to automate the processing of inspection setup data across all systems. You can either trigger the distribution manually (send the data directly) or automatically with the help of change documents.

Integration

The distribution function for the inspection setup is integrated in the general functions for ALE processing of material master data in the R/3 System.

Prerequisites

You must have made the relevant settings in Customizing.

Features

1. The R/3 System loads the selected data (manually or using change indicators) from the database of the source system and creates an IDoc for each material-plant-combination.
2. The IDoc is sent to the target system that you have entered, or to the target system maintained in the distribution model.

There are the following options:

[Sending the Inspection Setup Directly \[Page 144\]](#)

This function allows you to trigger the distribution of newly created inspection setup data to one or several target systems manually.

[Distributing Inspection Setup Data Using Change Documents \[Page 146\]](#)

This function allows you to distribute the inspection setup automatically, with the help of change documents.

You manage changes to master data objects using the SMD tool (Shared Master Data). This tool distributes changes to master data and combines:

- All the changes to a master data object that have taken place in various transactions throughout the R/3 System and that are stored in different tables into one single change to the master data object
- Changes that took place over a period of time into one single change to be distributed



The SMD tool is linked to the change interface. If master data is relevant for distribution, the application writes a change document. The contents of this change document are transferred to the SMD tool, which sets a change indicator, loads the application data, and creates the IDoc.

3. In the target system, the data from the IDoc is written to the application tables in the R/3 System, after various checks have been carried out.

Distribution of Inspection Setup Using ALE

The checks that are made are similar to those that take place when the inspection setup is created manually in the material master.

4. If an error occurs during one of the checks, it is documented in the ALE tool. If errors occur, the processing is cancelled and the data is not saved in the target system.
5. In the target system, a message list is created in ALE services that shows the status of the posted master IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

Sending the Inspection Setup Directly

Sending the Inspection Setup Directly

Use

You use this procedure to manually trigger the distribution of newly created inspection setup data.

Prerequisites

You must have made the relevant settings in Customizing.

Procedure

1. Choose *Tools* → *ALE* → *Master data* → *Logistics* → *Quality Management* → *Inspection Setup* → *Send*.
2. On the initial screen, enter the materials, whose inspection setup (inspection types) you want to send.



You can limit the selection further, by entering the plant.

3. Enter the logical target system, if you do not want the target system(s) to be taken from the distribution model (in Customizing).



You can enter any target system that is maintained as a logical system. If you did not enter a system, the data is sent to **the** target system that was entered in the distribution model.

4. In the *Inspection type or placeholder* field, enter the inspection type that is to be deleted for the material-plant combination you have entered, if this inspection type already exists in the target system.



You can delete generically by using placeholders (* or +). The entry is transferred to the target system unchecked, since it is not possible to check against the inspection types in the target system.

5. Choose *Execute*.

The system loads the selected data from the database of the source system and writes it to one or more IDocs.



One IDoc is created for each material and plant. This means that an IDoc can contain several data segments, if several inspection types are available for a material-plant combination, or if an inspection type to be deleted or placeholder was entered. If there are several materials, then several IDocs are created.

6. In the target system, choose *Tools* → *ALE* → *Administration* → *Services* → *Manually process IDocs*.

Sending the Inspection Setup Directly

- From the list, select the IDocs to be transferred and choose *Process*.



You can automate the processing. This means that the posting of the IDocs takes place immediately and does not have to be triggered manually.

- Enter the IDoc number in the target system and choose *Execute* again.

Result

- After running various checks, the system writes the inspection setup to the application tables in the target system.
- If an error occurs during one of the checks, it is documented in the ALE tool. If errors occur, the processing is cancelled and the data is not saved in the target system.
- In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

Distributing Inspection Setup Data Using Change Documents

Distributing Inspection Setup Data Using Change Documents

Use

You use this procedure to distribute inspection setup data automatically, using change documents.

Prerequisites

- When the inspection setup is created, changed or deleted, change documents must be written.



If you use the mass processing function for the inspection setup and want to distribute the data you have changed, you must have set the *Create change documents* indicator in the [mass processing for the inspection setup \[Page 140\]](#) function.

- You must have made the relevant settings in Customizing.

Procedure

1. In the source system, choose *Tools* → *ALE* → *Administration* → *Services* → *Change pointers* → *Evaluate*
2. Enter the message type *MATQM* and choose *Execute*.

The system selects the data that has been changed and writes it to one or more IDocs.



One IDoc is created for each material and plant. This means that an IDoc can contain several data segments, if there are several inspection types for the material-plant combination. If there are several materials, then several IDocs are created.

3. In the target system, choose *Tools* → *ALE* → *Administration* → *Services* → *Monitoring* → *Manually process IDocs*.
4. From the list, select the IDocs to be transferred and choose *Process*.



The number of IDocs in the source and target system are not the same.

You can automate the processing. This means that the posting of the IDocs takes place immediately and does not have to be triggered manually.

Result

- After running various checks, the system writes the inspection setup to the application tables in the target system.
- If an error occurs during one of the checks, it is documented in the ALE tool. If errors occur, the processing is cancelled and the data is not saved in the target system.

Distributing Inspection Setup Data Using Change Documents

- In the target system, a message list is created in ALE services that shows the status of the posted IDocs (and of those that have not been posted because they contained errors), as well as the short text for the error message (if required).

See also:

[Distributing ALE Master Data \[Ext.\]](#)

History for Basic Data

History for Basic Data

Use

If you change master inspection characteristics and/or inspection methods that are referenced in a task list, material specification or certificate profile, this has the following effects:

- If you change basic data **with history**, the changes are not automatically made in the inspection plan, material specification or certificate profile.
- If you change basic data **without history**, the changes are automatically updated immediately in the inspection plan, material specification and in the certificate profile.

Prerequisites

If you want to use a history, the *Inspection characteristics with history* indicator, or the *Inspection methods with history* indicator (or both) must be set in [Customizing \[Ext.\]](#)

Features

Changing with history

You can change the following basic data with history:

- Master inspection characteristics
- Inspection methods

This has the following effects:

- The system creates a new [version \[Page 151\]](#) for the changed master record that has the same validity period as the "old" version.
- The "old" version of the master record continues to be used in the master inspection characteristic, inspection plan, material specification and/or the certificate profile, in which it was previously referenced.
- If you create a new reference to the master record, the system automatically selects the new version of the master record. However, you can also enter the "old" version of the master record.
- You can [replace \[Ext.\]](#) the "old" version of a referenced master record by its new version. The new version, however, must have been released for use.
- When you change a referenced master record, a dialog box appears automatically when you save, prompting you to replace the old version, provided that the *Replace master inspection characteristic* and/or *Replace inspection method* indicators have been set in [Customizing \[Ext.\]](#).



You can only replace master inspection characteristics in material specifications and task lists and inspection methods in task lists.

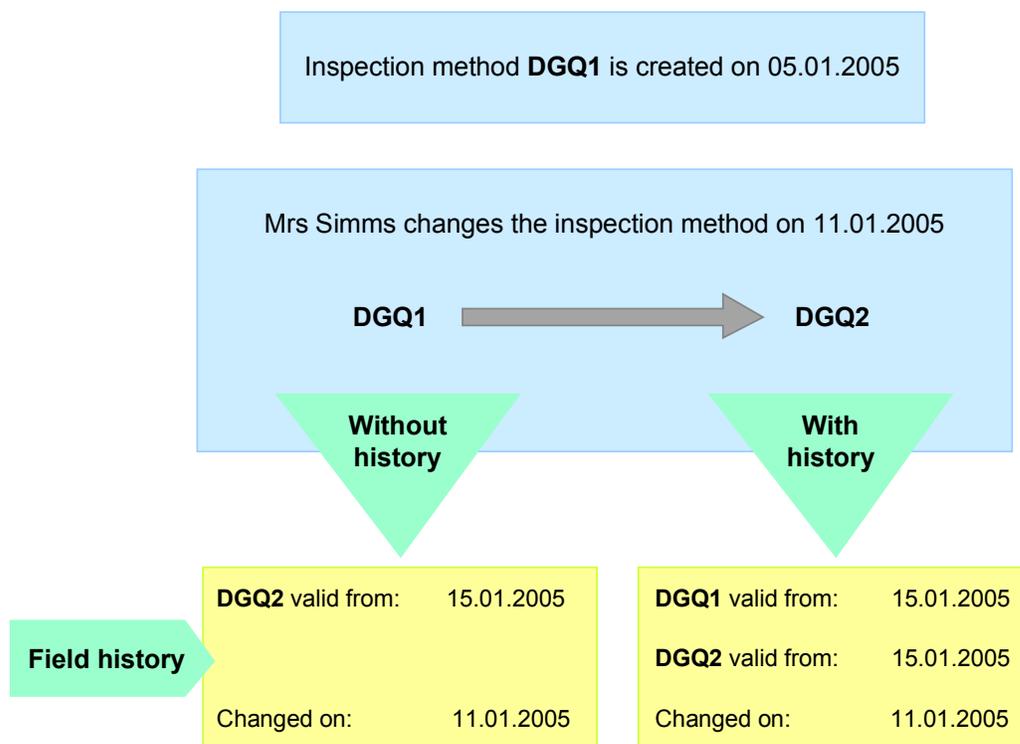
Changing without history

If you change a referenced master record without history, the changes are immediately effective in the master inspection characteristic, inspection plan, material specification or certificate profile.

Displaying the field history

In the history for master inspection characteristics, you can display a change history for individual data fields. The following applies:

- If you changed a master record with history, the system lists all changes made to the selected field, including the name of the user who changed the field, the date the field was changed, and all the previous values of the field.
- If you changed a master record without history, the system displays only the current value in the field.



Activities

- You call the change transaction for master inspection characteristics or inspection methods.
- You enter a valid-from date for the master inspection characteristic or inspection method.
- You make the required changes.
- You save your data.
- The system automatically creates a new version of the master inspection characteristic or inspection method, if you have set the relevant indicator in Customizing.

History for Basic Data

- To call the field history function, in the master inspection characteristic or inspection method, place the cursor on the required data field and choose *Field history*.
- To show all changes to the short text, on the *Other Languages* screen of the master inspection characteristic or inspection method, choose *Text history*.
- To display the assignment history of inspection methods to the master inspection characteristic, on the *Assigned Inspection Methods* screen in the master inspection characteristic, choose *Assignment history*.
- To display the assignment history of catalogs to the master inspection characteristic, on the *Assigned Inspection Catalogs* screen in the master inspection characteristic, choose *Assignment history*.



The system only displays the data that has already been saved in the database.

See also:

[Editing a Sampling Procedure \[Page 106\]](#)

[Editing a Sampling Scheme \[Page 119\]](#)

[Creating or Changing a Dynamic Modification Rule \[Ext.\]](#)

[Creating or Changing a Master Inspection Characteristic \[Page 36\]](#)

[Creating or Changing an Inspection Method \[Page 80\]](#)

Version Management for Basic Data

Use

This function allows you to manage different versions of a master inspection characteristic or an inspection method.

In the *Quality Management* application component, versions of master data records can be created as follows:

- You can create versions of [master inspection characteristics \[Page 36\]](#) and [inspection methods \[Page 80\]](#) manually that have different valid from dates.
- If you use the history management function in your system, the system automatically creates a new version with the same validity period (same valid from date), when you change a master record.

If an inspection method is used in a master inspection characteristic or in an inspection plan, or if a master inspection characteristic is used in an inspection plan, material specification or a certificate profile (or a combination of these), a version of the relevant master record is always referenced.

Prerequisites

If you want to use a [history \[Page 148\]](#), you must set the *Inspection characs with history* indicator, or the *Inspection methods with history* indicator (or both) in [Customizing \[Ext.\]](#).

Features

- If you create a new version of the master record, the "old" version continues to be used in the master inspection characteristic, inspection plan, material specification and/or the certificate profile, in which it was previously referenced, provided that you make the changes **with** history.
- If you change a referenced master record **without history**, the changes are immediately effective in the master inspection characteristic, inspection plan, material specification or certificate profile.
- If you create a new reference to the master record, the system automatically selects the new version of the master record. However, you can also enter the "old" version of the master record.
- You can [replace \[Ext.\]](#) the "old" version of a referenced master record by its new version. The new version, however, must have been released for use.
- When you change a referenced master record **with history**, a dialog box appears automatically when you save, prompting you to replace the old version, provided that the *Replace master inspection characteristic* and/or *Replace inspection method* indicators have been set in [Customizing \[Ext.\]](#).



You can only replace master inspection characteristics in material specifications and task lists and inspection methods in task lists.

Version Management for Basic Data

- You can display the valid versions of a master record, by choosing *Time line* in the function for creating, changing or displaying the master record. The system then displays a list of all valid versions of the required master record in chronological order of their validity.

Activities

- You choose *Logistics* → *Quality management* → *Quality planning* → *Basic data*.
→ *Inspection characteristic* → *Create version* or
→ *Inspection characteristic* → *Create version* or
- To simplify data entry, you can use a reference. You either enter the identifier for the master record directly, or in the *Reference* section, enter the required selection criteria. If you do not make an entry, the system automatically chooses the previous validity period as a reference and copies the data.
- You enter the required data and save the new version of the master record.
If you save a changed master record that is in use, the system displays a confirmation prompt asking you whether you want to replace the old version.
- The system allocates the version number of the master inspection characteristic or inspection method **internally**, when you save.



Three versions already exist for the master inspection characteristic **CH-ABC**:

Version	Valid from
1	01.06.2000
2	04.06.2000
3	07.06.2000

You want to create a new version for master inspection characteristic CH-ABC that is to be valid from 05.06.2000.

On the initial screen, you enter the identifier CH-ABC. The system copies the data for the most current version of CH-ABC on this date (in this case version 2).

On the data screen, change or supplement the data from version 2.

Once you have saved the version, the new version you have created is given the highest version number for the master record (in this case version number 4).

Version	Valid from
1	01.06.2000
2	04.06.2000
4	05.06.2000
3	07.06.2000

