Worklist

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SAP ™

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Icons

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Worklist

Purpose

You can use the **worklist function** to execute recurring tasks when processing inspection lots. You can generate a list of objects for the current task based on the selection criteria you enter. You can then process these objects sequentially in a quicker and more efficient manner.

Features

You can carry out the following tasks using the worklist function:

- Trigger source inspections [Page 16]

- Trigger inspections for batches [Page 18] (monitoring the expiration dates and dates for recurring batch inspections)

- Display or change inspection lot data [Page 22]

- Process inspection lots for results recording

    - Record results [Page 24]

    - Record results using a list [Page 31]

    - Perform process-optimized [Page 35] results recording

    - Prepare mobile recording [Page 28]

- Process inspection lots without inspection completion [Page 43]

- Process inspection lots with outstanding quantities in inspection stock [Page 45]

- Process inspection lots without usage decisions [Page 47]

- Make a collective usage decision for inspection lots [Page 49]

- Make automatic usage decisions for inspection lots and inspection lots for orders [Page 53]

- Determine and bill additional costs for QM orders [Page 55]

You can also use the functions for job planning [Page 10] and report variants [Page 7] to further automate some of the tasks for inspection processing.

Report Variant Types in QM

Use

If you determine selection criteria for a frequently used worklist function using a report variant, you define the criteria on two levels:

- **Initial Screen Level**

    You can make the initial screen of a worklist function user-specific and define it as a report variant. There are hierarchical levels for the variant types. Users find the following display schema useful for variant types:

Report Variants	Naming Convention	Application Area	Defining Level
1. User variant • Pushbutton (*My default*)	`U_<user name>`	User	User
2. Standard variant	`SAP_TCODE_xxxx` (`xxxx` represents the transaction code that creates the relevant list)	All users	System administrator (Customizing)
3. System variant	`SAP&TCODE_xxxx` (`xxxx` represents the transaction code that creates the relevant list)	All users	System default

    ➡

    For more information about the different variant attributes, see the Basis documentation Variant Attributes [Ext.]. For more information about the selection variables, see the Basis documentation Variable Values in Variants [Ext.].

- **List Variant Level**

    If the relevant worklist is displayed using the *ABAP list viewer,* you can determine a list variant for the worklist by defining the following information*:*

    − Fields that should be displayed

    − Sort criteria

    − Filter requirements

    For more information, see the Basis documentation Display Variants [Ext.]

Defining a Report Variant

Prerequisites

You have authorization to create a report variant.

Procedure

1. Choose *Logistics → Quality Management → Quality Inspection → Worklist,* and then the function for which you want to define a report variant with your own defaults.

2. Enter the required selection criteria for the chosen function on the initial screen.

3. Choose *My default.*

    The initial screen is copied as a variant (`U_<user name>`).

4. Choose *Variant attributes,* and enter the required settings.

    For more information about variant attributes, see the Basis documentation Variant Attributes [Ext.].

    For more information about dynamic value assignment when changing values in a report variant, see the Basis documentation Variable Values in Variants [Ext.].

5. Save the data.

Result

When you next call up the function, the default report variant is automatically displayed.

    If after entering selection criteria on the initial screen of the worklist, you choose *Save*, you can select a variant with a user-defined name. However, you must manually choose such a variant when calling up the worklist function.

Retrieving, Displaying, or Deleting Report Variants

1. Choose *Logistics* → *Quality management* → *Quality inspection* → *Worklist*, and then the required function.

   The initial screen with the selection criteria appears.

2. Depending on your needs, choose one of the following functions:

   – *Go to* → *Variants* → *Get*

   – *Goto* → *Variants* → *Display*

   – *Go to* → *Variants* → *Delete*

Job Planning

Use

If you use the worklist functions in inspection processing, you can individually preassign the selection criteria for executing a report using report variants. Using job planning you control when and at which intervals a report should be executed.

Features

You can schedule jobs for the following worklist tasks:

- Automatic triggering of source inspections

- Automatic triggering of recurring inspections (monitoring the expiration dates and dates of recurring inspections for batches)

- Making automatic usage decisions for inspection lots

- Making automatic usage decisions for inspection lots for an order (production order, run schedule header or maintenance order)

Creating a Job Variant

1. Choose *Logistics → Quality management → Quality inspection → Worklist*, and then depending on your needs:

   − *Inspection lot creation → Source inspection → Job planning*

   − *Inspection lot creation → Deadline monitoring → Job planning*

   − *Inspection lot completion → Automatic UD (general) → Job planning*

   − *Inspection lot completion → Automatic UD (orders) → Job planning*

   The screen for the job planning of recurring inspections or automatic usage decisions appears.

2. Choose S*chedule job → Create variant.*

   A dialog box appears.

3. Enter the variant name and choose *Create.*

   The screen for screen assignment appears. This screen is not relevant for the *Quality Management* application component.

4. Choose *Continue* without changing the setting.

   The screen for entering selection criteria appears.

5. Enter the desired selection criteria, and choose *Edit → Continue*.

   A screen with the variant and field attributes appears.

6. Enter a short description for the variant and, if necessary, select one or more variant attributes (for example, background only, protect variant or do not display variant).

   ⇨

   For more information about variant and field attributes, see the Basis documentation Variant Attributes [Ext.].

   For more information about dynamic value assignment when changing values in a report variant, see the Basis documentation Variable Values in Variants [Ext.].

7. Select the desired field attributes (optional).

8. Save the data.

   The initial screen for maintaining variants appears, and the system displays the message that the variant has been saved.

Scheduling a Job Variant for Execution

1. Choose *Logistics → Quality management → Quality inspection → Worklist*, and then depending on your needs:

    −   Inspection lot creation → Source inspection → Job planning

    −   Inspection lot creation → Deadline monitoring → Job planning

    −   *Inspection lot completion → Automatic UD (general) → Job planning*

    −   *Inspection lot completion → Automatic UD (orders) → Job planning*

        The screen for the job planning of recurring inspections appears.

2. Choose one of the variants by marking the variant with the cursor.

3. Choose *Schedule job → Schedule job.*

        The screen for entering job planning data appears.

4. Enter the date (day and time) when the job should be executed.

5. Depending on your needs, choose one of the following functions:

    −   *Schedule once*

        If you choose this function, the system schedules the execution of the job **once** on the given date.

    −   *Schedule periodically*

        If you choose this function, the system displays a dialog box. You can then determine the intervals at which the job is to be repeated (for example, twice a month). Choose *Create* to save the variant with the scheduling options.

Displaying a Job Overview

Use

You can display an overview of the jobs that have been scheduled for execution (for example, *start date, start time, status, scheduler and variant*).

Procedure

1. Choose *Logistics → Quality management → Quality inspection → Worklist*, and then depending on your needs:

   – *Inspection lot creation → Source inspection → Job overview*

   – *Inspection lot creation → Deadline monitoring → Job overview*

   – *Inspection lot completion → Automatic UD (general) → Job overview*

   – *Inspection lot completion → Automatic UD (orders) → Job overview*

   The job planning screen appears.

2. If you want to display the job overview, choose *Goto → Show scheduling.*

Deleting, Printing, or Changing a Job Variant

1. Choose *Logistics → Quality management → Quality inspection → Worklist*, and then depending on your needs:

   - *Inspection lot creation → Source inspection → Job planning*

   - *Inspection lot creation → Deadline monitoring → Job planning*

   - *Inspection lot completion → Automatic UD (general) → Job planning*

   - *Inspection lot completion → Automatic UD (orders) → Job planning*

   The screen for the job planning of recurring inspections or automatic usage decisions appears.

2. Choose one of the variants by marking the variant with the cursor.

3. Choose S*chedule job → Show/change variant.*

   A screen with the selection criteria and parameters for the variant is displayed.

4. Depending on your needs, choose one of the following functions:

   Deleting a variant

   a. Choose *Variants → Directory*.

   A screen with information about variant catalogs appears.

   b. Choose *Variants → Delete*.

   A dialog box appears in which you must select the variants to be deleted.

   c. Delete the variant(s).

   Printing a variant

   a. Choose *Variants → Print*.

   A screen for entering print parameters appears.

   b. Enter the print parameters, and choose *Output → Print*.

   Changing selection criteria

   a. Choose *Variants → Change values*.

   b. Change the selection criteria and choose *Variant → Save*.

   Displaying or changing variant attributes

   a. Choose *Variants → Display attributes* to display the attributes for the variant.

   b. Choose *Variants → Change attributes* to change the variant and field attributes.

Application Log in QM

Use

The Application Log is a tool for collecting messages, saving, reading, and deleting logs in the database and displaying logs. Situations can arise at runtime in application programs that must be brought to the user's attention. These are primarily processing errors.

Features

In QM, you can display an application log for the following functions:

- Automatic usage decision (general)

- Automatic usage decision (lots for orders)

- Deadline monitoring of batch materials

In an application log, you receive an overview of all jobs processed for a given function. The messages listed in the log are displayed with colored icons that have the following meaning:

- Red (error)

    These messages indicate a faulty processing run. For one reason or another, the processing was not successful for these entries. No further processing is possible here.

- Yellow (warning)

    With these entries, the processing was only partially successful. It is possible, however, to manually process these entries further.

- Green (information)

    For these entries, the processing was completed successfully.

Activities

Depending on the application log you want to display, you choose *Logistics → Quality Management → Quality Inspection → Worklist →*:

- *Inspection Lot Creation → Deadline Monitoring → Log*

- *Inspection Lot Completion → Automatic Usage Decision (General) → Log*

- *Inspection Lot Completion → Automatic Usage Decision (Orders) → Log*

Triggering of Source Inspections

Use

You create a list of materials with outstanding purchase orders and scheduling agreements (with no goods receipt posted or inspection lot created), which are scheduled for **source inspections** at the vendors. A source inspection is initiated and supervised by the customer, ordering party or his representative. A source inspection can be carried out by:

- The party receiving the goods or services

- The vendor, in the presence of the recipient

- A third party empowered by the recipient

Prerequisites

When the system generates a worklist for source inspections, it only considers materials and vendors for which:

- Quality information records exist (these records specify a source inspection as the inspection type).

- The inspection type has been defined and activated in the material master record.

Features

When you generate a worklist for source inspections, the system considers a period during which the inspection must be performed (including the lead time defined in the quality information record).

Triggering Source Inspections Manually

You can manually generate a list of materials that are defined for a source inspection. If you want to use the same selection criteria more than once, you can define a report variant. For information about how to trigger source inspections manually, see .

Job Planning and Execution

You can use the job planning and execution functions to trigger a source inspection automatically at predefined intervals.

Triggering Source Inspections Manually

1. Choose *Logistics → Quality management → Quality inspection → Worklist → Inspection lot creation → Source inspection → Trigger manually.*

     The screen for entering selection criteria appears.

     If you define a report variant using the user's logon name or a predefined name in Customizing, the defined selection criteria are automatically displayed. If you defined a report variant using a miscellaneous name, choose *Goto → Variants → Get* to call up the report variant.

2. If you did not define a report variant, enter the desired selection criteria (for example, vendor, material and plant).

     The system provides default values for the planned delivery date and opening period. You can change these default values.

3. Choose one of the following options to generate the selection list:

   − *Program → Execute*

   − *Program → Execute and print*

   − *Program → Execute in background*

     The system creates a list of materials that are defined for a source inspection.

4. There are the following options:

   − Create an inspection lot for an item in the list

   − Display the scheduling agreement (purchase order) for a material

   − Display the *quality information record* for a material

Triggering Inspections for Batches

Use

Certain materials that are maintained in batches and stored in warehouses must be inspected on a regular basis to ensure that quality requirements are maintained. The *Quality Management* (QM) application component provides a means of monitoring these materials automatically on the basis of the:

- Inspection interval

- Batch expiration dates (maximum shelf-life)

- Dates of recurring inspections

- Next inspection date

By monitoring these dates, the system can automatically identify all batches that are defined for inspection lot creation, a status change, or a transfer posting.
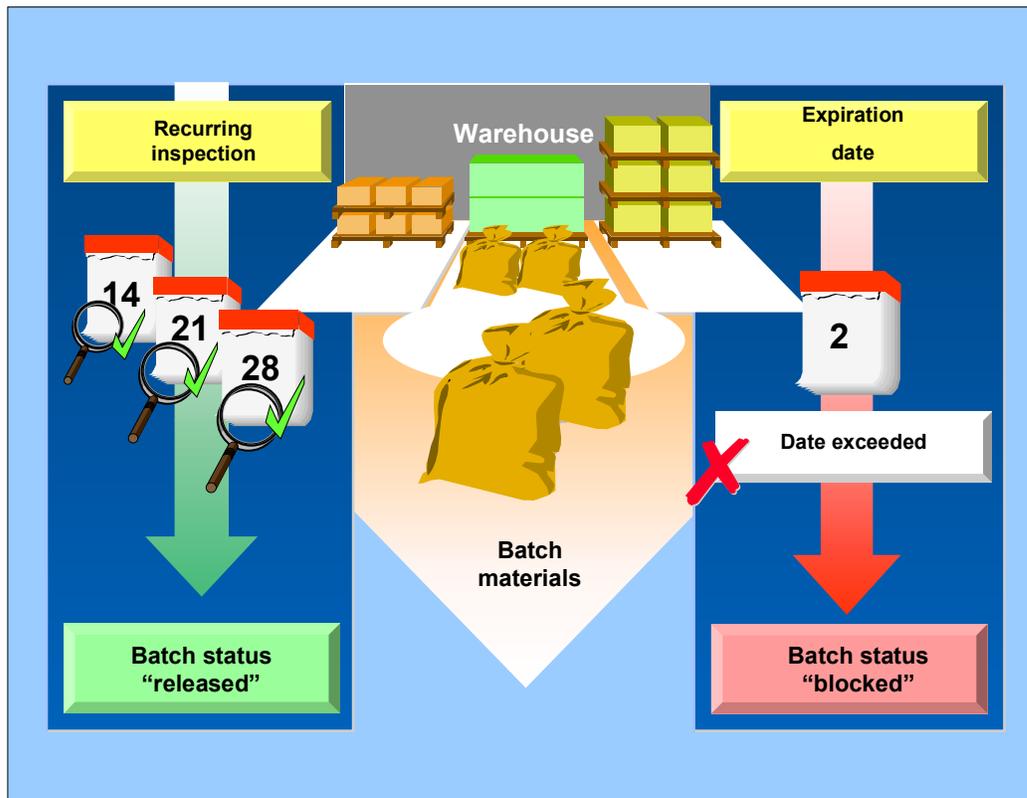
Prerequisites

The system can only monitor the dates if you have done the following in the *Quality management* view of the material master record for the batch:

- Defined an *inspection interval*

- Activated *inspection type* 09 **(recurring inspection)** in the *inspection setup*

Features

Monitoring the Batch Expiration Date

If the expiration date of a batch is exceeded, the system automatically makes a transfer posting. This will occur if:

- The batch expiration date has been exceeded within the opening period. This means that the current date plus the lead time is after the batch expiration date.

- You have set the control indicator for blocking the batch on the selection screen for recurring inspections.

If these conditions have been met, the system will make the following transfer postings:

- The batch status is changed to "not released," if the batch status management function is **active** in the batch plant.

- The batch stock is posted to blocked stock, if the batch status management function is **not active** in the batch plant.

If the indicator for blocking the batch is not set, the system generates a list of all batches for which the expiration date has been reached or exceeded.

Monitoring the Dates for Recurring Inspections

The system can trigger a recurring inspection automatically, if the date of the next inspection is in the opening period. This means that the current date plus the lead time is after the next inspection date. In this case, the system creates an inspection lot for each storage location.

This will occur if you have defined the intervals at which the dates are to be monitored in the material master record (at plant level).

In addition to creating an inspection lot, the system can also block the batch or post the batch stock to inspection stock. In this case, blocking a batch means:

- The batch status is changed to "not released," if the batch status management function is **active** in the batch plant.

- The batch stock is posted to blocked stock, if the batch status management function is **not active** in the batch plant.

These stock changes can be made:

- Immediately after lot creation

- If the batch expiration date is reached or exceeded

In both these cases, the system makes a delayed transfer posting that allows the batch stock to remain in unrestricted-use stock as long as possible. You can still carry out inspections during this time. If the system makes delayed transfer postings, a job should be scheduled every day, to ensure that the stock is blocked properly.

Manual Triggering of Recurring Inspections

You can manually generate a list of materials that are defined for a recurring inspection. If you want to use the same selection criteria more than once, you can define a report variant for the selection criteria. For information about how to trigger recurring inspections manually, see Triggering Recurring Inspections Manually [Page 21].

Triggering Inspections for Batches

Job Planning and Execution

You can use the job planning and execution functions to make the system trigger recurring inspections automatically at predefined intervals.

Triggering Recurring Inspections Manually

1. Choose *Logistics → Quality management → Quality inspection → Worklist → Inspection lot creation → Deadline monitoring → Trigger manually.*

    The screen for entering selection criteria appears.

2. Enter the desired selection criteria and set the desired indicators.

3. Choose one of the following functions:

    − *Program → Execute*

    − *Program → Execute and print*

    − *Program → Execute in background*

    The system automatically creates inspection lots for the materials that are defined for recurring inspections, and then displays a list with information on whether:

    − Inspection lots were created.

    − Defects occurred during inspection lot creation or inventory posting

Displaying or Changing Inspection Lot Data

Use

You can use this function to generate a list of inspection lots for which you want to display or change data. You can display or change the following data:

- Inspection lot specifications

- Usage decision data

- Characteristic results

- Defect records

In addition to displaying or changing the above data for an inspection lot, you can also generate statistics in the form of an SAP business graphic or transfer selected data to an Excel spreadsheet.

The following information (amongst other data) is displayed for the inspection lots:

- End date

- Origin

- Material

- Batch

- Material short text

- Number of outstanding short-term characteristics

- Number of outstanding long-term characteristics

- Inspection lot quantity

- Base unit of measure

- Share of defects

For information about how to create a worklist for inspection lots, see Displaying or Changing Inspection Lot Data [Page 23].

Displaying or Changing Inspection Lot Data

1. Choose *Logistics → Quality management → Quality inspection → Worklist → Inspection → Change data* or *Display data.*

   The screen for entering selection criteria appears.

   You can limit inspection lot selection to inspection lots with a usage decision or to lots without a usage decision.

2. Enter the desired selection criteria.

3. Choose one of the following functions:

   − *Program → Execute*

   − *Program → Execute and print*

   − *Program → Execute in background*

   The system displays a list of inspection lots that correspond to the given selection criteria.

4. Select an inspection lot, and choose the corresponding function from the menu bar to display or change the desired inspection lot data.

Results Recording

Use

This function includes a worklist for recording inspection results for all objects that allow results recording (*inspection lots, partial lots, inspection points* in production or goods receipt*, physical samples, equipment, and functional locations*).

On the selection screen, you first define the selection criteria for the objects to be processed and then start the selection.

You can navigate between different processing objects on the recording screen. You can use an integrated graphic display in the lower screen area to call up a:

- Histogram [Ext.]

- Run-chart [Ext.]

- Control chart [Ext.]

> For more information about setup options for the graphic, see Chart OCX Presentation Graphic [Ext.].

Features

Selection Screen

You can define search criteria for inspection lots on the selection screen using the following tab pages:

Tab Page	Function
Material	Multiple ways to limit the search for inspection lots (for example, according to *material*)
Physical sample	Limiting the inspection lot search to certain physical samples
Equipment/Functional location	Limiting the inspection lot search to certain equipment/functional locations
Inspection lot number	Limiting the inspection lot search to certain inspection lot numbers or number intervals

> You can simplify the selection by defining personal selection criteria using *My default*. For more information, see Defining Report Variants [Page 8].

Recording Screen

After inspection lot selection, the first operation with characteristics to be processed appears automatically. The corresponding characteristic overview screen [Ext.] is displayed to record results. (If you select a characteristic for results recording, the characteristic single screen [Ext.] appears.)

There is an overview tree of the inspection lots in the worklist in the screen area on the left. The hierarchy has the following levels:

Hierarchy Level	Icon
Inspection lot or partial lot	
Operation	
Inspection point (physical sample, equipment, functional location)	
Inspection characteristic	

The objects in the overview tree are displayed differently depending on your recording needs:

Presentation	Meaning
Highlighted in color and underlined	The object needs results recording because outstanding characteristics exist. **Outstanding characteristics are:** • Unprocessed required characteristics • Characteristics being processed • Valuated characteristics You access the recording transaction by clicking on the object.
Highlighted in color but not underlined	Only at inspection lot and partial lot level: Results recording is necessary because outstanding characteristics exist.
Not highlighted in color (or underlined)	These are not outstanding characteristics. If required, you can access the recording transaction by double clicking on the object.

The current valuation status is displayed according to the valuation level by a traffic light:

• **Characteristic Valuation**

Icon	Meaning
Gray	No valuation
Green	Valuation "Accepted"
Red	Valuation "Rejected"
	Unsuccessful valuation

Results Recording

- **Valuation of the Inspection Point, Equipment, Functional Location**

Icon	Meaning
◈ Gray	No valuation
● Green	Valuation "Accepted"
■ Red	Valuation "Rejected"

- **Valuation of Physical Samples**

Icon	Meaning
🏷	Physical sample released for results recording
✖	Physical sample not released for results recording
● Green	Valuation "Accepted"
■ Red	Valuation "Rejected"

You can also use the following basic functions on the recording screen:

Function	Icon/Pushbutton	What you should know
Show the overview tree as standard size	🗔	Drop-down menu for: - Hiding the overview tree - Restoring standard size
Expand subordinate hierarchy levels of the overview tree at the inspection lot level	🗗	The function relates to a selected object in the hierarchy or, if no object has been selected, for the whole overview tree.
Collapse subordinate hierarchy levels of the overview tree at the inspection level	🗗	The function relates to a selected object in the hierarchy or, if no object has been selected, for the whole overview tree.
Update overview tree	🔃	Drop-down menu for: - Updating the overview tree - New selection
Define sorting for the overview tree	📥	You can define certain Sort fields (for example, *Inspection lot, Material*) from a *Field list,* according to which the overview tree is structured. You can sort these in ascending or descending order.

Layout functions		For example, if you have defined field selection and sorting for the overview tree, you can save this as a variant, and then use the desired variant directly when you use results recording again.

For more information about functions for the recording screen (characteristic overview screen or the characteristic single screen), see Single Functions [Ext.].

> You can access other (context-related) functions using the right mouse button.
>
> When you have recorded inspection results for an inspection lot, you can switch to the usage decision by double clicking on the corresponding inspection lot.

Activities

To access the results recording function, choose *Logistics → Quality Management → Quality Inspection*, and then:

- Worklist → Results Recording

- *Result → Results Recording*

Mobile Results Recording

Purpose

With mobile results recording, you can immediately record inspection results that do not occur in the work center using a mobile application and then transfer them to the SAP System. For example, mobile results recording can be used during:

- Field inspections in the area of environmental management

- Tours of inspection

- The inspection of single components in a product

- The inspection of heavy objects

In the SAP System, you define in the transaction "Mobile results recording", which inspections should be made using a mobile application. The selection is made in the form of an allocation at the inspection operation level and defines which inspector performs the inspection with which application.
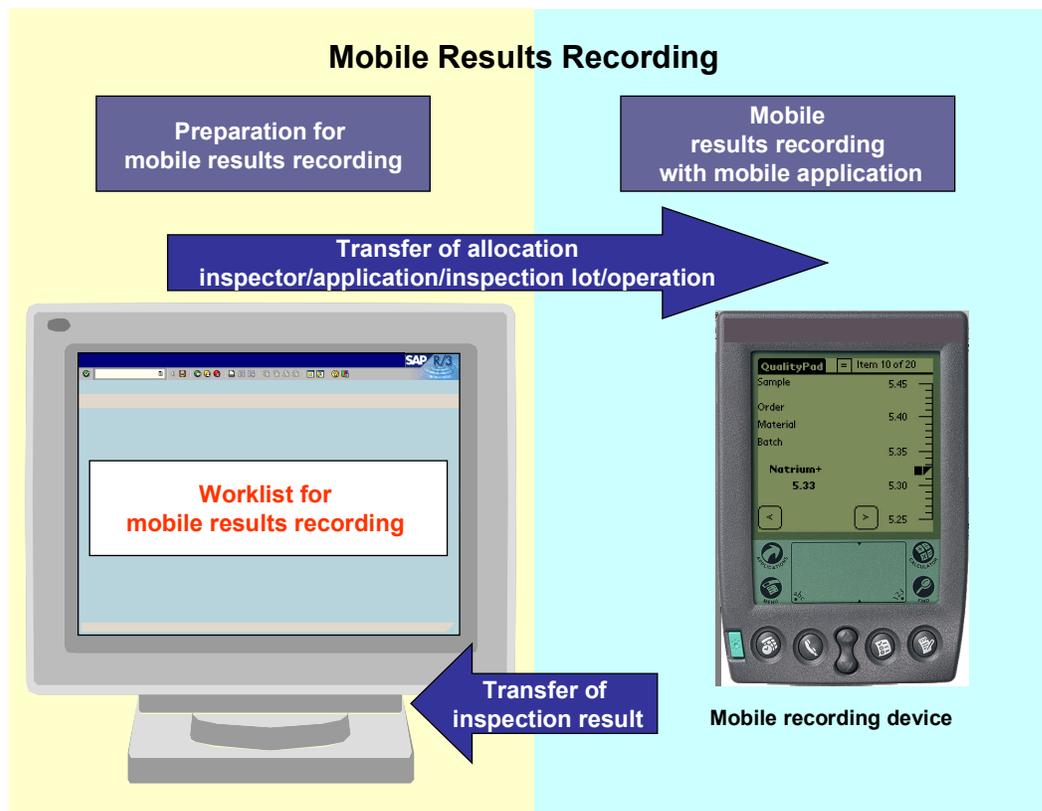
Prerequisites

- One or more mobile recording devices with an application for results recording and synchronization with the SAP System. This is not a part of the SAP standard system. You can access information about available mobile applications, supported devices, and corresponding BAPI interfaces on the QM homepage in SAPNet.

- The mobile applications are defined in Customizing: *Quality Management → Quality Inspection → Subsystems → Define Applications for Mobile Recording.*

Process Flow

1. Create and save a worklist for a mobile application and inspector using the transaction "Mobile results recording". (*Logistics → Quality Management → Quality Inspection → Worklist → Mobile Results Recording.*)

2. The inspector synchronizes the mobile application with the SAP System. The exact procedure depends on the type of device and the synchronization software that is used. During synchronization, the worklist defined for the inspector is transferred to the mobile recording device.

3. The inspector inspects and records results using the mobile application.

4. The inspector synchronizes the mobile application with the SAP System. In this way, inspection results are transferred to the SAP System and the new worklist is created.

The single assignments in the transaction "Mobile results recording" can still be monitored and edited. This is required for the postprocessing of confirmation errors.

Result

The inspection results recorded using a mobile application are transferred.

Creating Worklists

Use

You can specify which operations are defined for recording using a mobile recording device. During this process, you assign the operations to a specific inspector and application. This assignment is called an allocation.

Procedure

1. To call up the function, choose *Logistics → Quality Management → Quality Inspection → Worklist → Mobile Results Recording.*

2. First choose an entry in the field *Selection scope* on the selection screen.

   You determine whether you want to edit new and/or existing allocations. A new allocation is a selection of several inspection operations, which is created from the inspection lot stock as a mobile worklist. An existing allocation was already created. However, since no results have been recorded yet, you can continue editing this allocation. This means, you can assign another inspector or application.

3. You choose the application on the selection screen with which you have recorded results.

   You can see the list of available applications on the QM homepage in SAPNet. However, you can also write your own applications and link to the SAP System using the open BAPI interfaces.

4. You choose the inspector who should record results.

5. If you want to edit new allocations, you can further limit the worklist to an inspection lot and/or operation.

6. There are two ways to create the worklist:

To	Choose:
Manually select the worklist	*Execute.* The list of selected inspection operations is displayed. Select the required operations and assign them to the inspector and application, which are displayed in the upper screen area, using the function *Create allocation.* Save the worklist.
Automatically create the worklist	The entry "Automatically create new allocations" in the field *Selection scope* for the worklist. Enter the required mobile application and inspector, choose the selection criteria in the upper screen area, and select *Execute.* All selected inspection operations are automatically allocated to the chosen inspector.

Results Recording with a List

Use

You use this function to record inspection results and create worklists for:

- Inspection lots

- Partial lots (optional)

- Operations

- Inspection points in production or at goods receipt (optional)

- Equipment/functional locations

- Physical samples

- Characteristics

Features

You can carry out the following functions in the list:

- Choose inspection lots, operations, inspection points, or characteristics, and record results.

- Update the list and change the selection criteria

- Save your selection criteria as a variant

- Display the legend for the processing status

- Expand or collapse the hierarchy nodes

Results Recording with a List
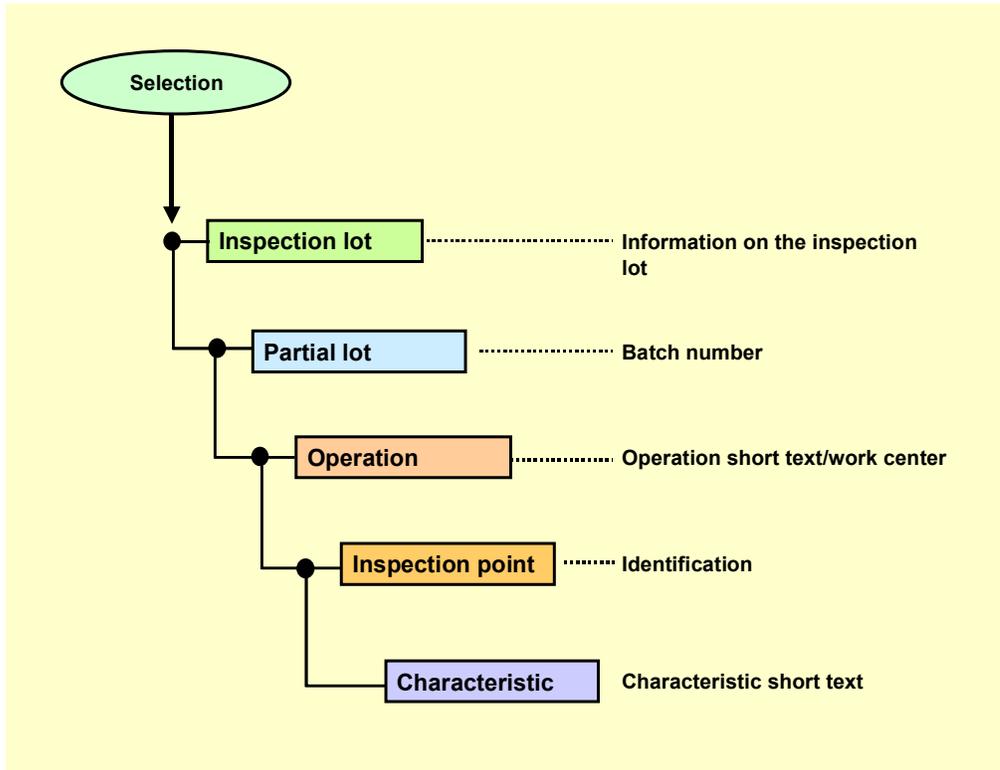
If no partial lots or inspection points are available, the system suppresses these hierarchical levels.

Recording Inspection Results using a List

Use

You can use this procedure to record inspection results for the following objects:

- Inspection lots

- Inspection points (in production or at goods receipt)

- Physical samples

- Equipment

- Functional locations

Procedure

1.

To	Choose	What you should know
Record results for an inspection lot	*Logistics → Quality management → Quality inspection → Worklist → Variants for results recording → Using a list*	Enter the desired selection criteria. Depending on your selection criteria (for example, *Inspection start*), the list can also include inspection points, physical samples, equipment or functional locations.
Record results for physical samples	*Logistics → Quality management → Quality inspection → Worklist → Variants for results recording → For physical samples*	Enter the desired selection criteria.
Record results for equipment	*Logistics → Quality management → Test equipment management → Calibration inspection → Inspection results → Worklist*	Enter the desired selection criteria.
Record results for functional locations	*Logistics → Quality management → Test equipment management → Calibration inspection → Inspection results → For a functional location → Worklist*	Enter the desired selection criteria.

2. Choose one of the following menu options:

   – *Program → Execute*

   – *Program → Execute and print*

   – *Program → Execute in background*

Recording Inspection Results using a List

A list of characteristics for the inspection lots appears that correspond to the entered selection criteria.

3. Expand the hierarchical structure of an inspection lot.

For an inspection lot with inspection points [Ext.], the inspection point number is included in the hierarchical structure.

4. Choose the object to be processed for results recording with a double-click.

For inspection lots, you can call up results recording at operation or characteristic level. For inspection points, physical samples, equipment, and functional locations, you can call up results recording directly by double-clicking on the respective object or at characteristic level.

5. Record the inspection results, valuate the characteristics, and close the characteristics.

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If you record results for an inspection point (in production or at goods receipt), physical sample, or equipment/functional location, you close the respective inspection point.

The field *Inspection point completion* at the operation level of the task list controls whether inspection point closure is manual or automatic. A Customizing setting controls automatic valuation. When you valuate manually, a dialog box for results valuation and the confirmation of inspection point data appears after you close all characteristics. For more information, see Recording Results for Inspection Points [Ext.].

6. Save the data.

Result

After you have processed the characteristics for an operation, the system displays the following on the screen:

*   The characteristics are displayed in different colors based on their statuses. (Choose *Extras* → *Legend* to display the color legend.)

*   A check mark is displayed to the left of the operation to indicate that results have been recorded for this operation.

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When you double-click on the corresponding inspection lot, you can switch to the usage decision.

Process-Optimized Results Recording

Purpose

Process-optimized results recording is a flexible method of processing characteristics in tabular form that is suitable for simple, self-contained recording processes. In this way, you can process inspection results according to the requirements of the recording procedure and work center. There are several possibilities for processing characteristic results in tabular form on one screen. In comparison with the usual inspection results processing [Ext.], process-optimized results recording allows you to:

- Overcome limits set by operations, inspection points and inspection lots

- Group characteristics in a flexible way for processing

In the standard system the following recording transactions are offered:

- Processing characteristics for several inspection lots [Page 41]

- Processing inspection points of an operation [Page 37]

- Processing for the master inspection characteristic across all inspection lots [Page 39]

Prerequisites

Process-optimized results recording is possible for summarized characteristics.

When processing **quantitative characteristics** (Variable inspection [Ext.]), the mean value is ready for input in process-optimized results recording. You enter the *standard deviation* in the usual results recording screen.

Features

You can process original values, calculated characteristics, classed results recording and manual valuation by branching to the usual results recording.

Due to a separation of user interface and internal data processing, process-optimized results recording allows you to implement new recording variants and techniques of data output on the frontend relatively easily.

Limitation

The following objects are not suitable for process-optimized results recording:

- Partial lots in SD

- Dependent and independent multiple samples

- Entries which require a digital signature [Ext.]

Operations that include conditional characteristics are not suitable for process-optimized results recording.

Process-Optimized Results Recording

Process Flow

1. You choose the appropriate transaction for processing inspection characteristics.

2. A work list with inspection lots is generated.

3. You select one or more inspection lots, according to your requirements.

4. You record or edit characteristic results.

5. When you save your data, the recorded results are saved on the data base.

Processing of Inspection Points for an Operation

Use

Using this function, you can process characteristic results for inspection points [Ext.] in production, equipment [Ext.]/functional locations and physical samples [Ext.] at operational level in the inspection lot. All inspection points and characteristics in the operation are displayed in tabular form and can be processed.

Features

This function provides the following processing options:

- Displaying, recording, and changing characteristic results

- Creating inspection points

- Setting characteristics for processing

- Switching to and returning from the display and processing transactions of the usual results processing

- Closing and saving the processed characteristics

- Entering an inspection description (long text)

- Calling up an error log

- Calling up a control chart

- Displaying the results history

- Calling up an STI evaluation

Activities

On the processing table, the individual inspection points for the inspection lot are displayed in rows in descending order.

- New inspection points must be entered in the first inspection point row.

   When you create an inspection point, you must enter the inspection point identification. When you have entered and saved the data, the current row moves down one row, and a new row appears in which you can create another inspection point.

- When you want to change the characteristic values of existing inspection points, you can enter data in recording fields for characteristics that have not yet been closed. Characteristics, which have already been closed, can be set for processing with double-click if required.

Recording Results in Tabular Form for Inspection Points

1. Choose *Logistics* → *Quality management* → *Quality inspection,* and then either:

   – *Results* → *For inspection points*

   – *Worklist* →*Results recording* → *For inspection points*

   The selection screen appears for tabular results recording for inspection points within an operation.

2. Enter the required selection criteria.

   The system displays a list of inspection lots that meet the selection criteria.

3. Choose an inspection lot, record the results, and save your entries using *Close characteristics and save*.

   When you have selected several operations, you can choose *Back* to call up the next operation for processing.

Results Recording for the Master Inspection Characteristic

Use

Using this function, you can record the results for a master characteristic for several inspection lots in a tabular form on a single screen. For example, you can use this function if you have to inspect one characteristic for several materials/batches.

Features

This function provides the following processing options:

- Displaying, recording, and changing characteristic results

- Setting characteristics for processing

- Branching to and returning from the display and processing transactions of the standard results recording function

- Closing and saving the processed characteristics

- Entering an inspection description (long text)

- Calling up an error log

- Calling up a control chart

- Displaying the results history

- Calling up an STI evaluation

Activities

The system displays the inspection lots that have been selected for the master inspection characteristic in rows in the processing table.

Recording Results in Tabular Form for a Master Inspection Characteristic

1. Choose *Logistics → Quality management → Quality inspection,* and then either:

    − *Results → For a master inspection charac.*

    − *Worklist →Results recording → For a master inspection charac.*

    The selection screen appears for tabular results recording for a master inspection characteristic.

2. Enter the required selection criteria (master inspection characteristic).

    The system displays a list of inspection lots that meet the selection criteria.

3. Select the desired inspection lots, record the results, and save your entries using *Close characteristics and save*.

Processing Characteristics for Several Inspection Lots

Use

Using this function, you can record the characteristic results for several inspection lots in a tabular form on a single screen.

Features

This function provides the following processing options:

- Displaying, recording, and changing characteristic results

- Setting characteristics for processing

- Branching to and returning from the display and processing transactions of the standard results recording function

- Closing and saving the processed characteristics

- Entering an inspection description (long text)

- Calling up an error log

- Calling up a control chart

- Displaying the results history

- Calling up an STI evaluation

Activities

The system displays the individual inspection lots with the recorded inspection results in columns in the table, sorted by the operations and their associated characteristics.

The entry fields for the characteristics that have not yet been valuated or closed are ready for input. If necessary, you can set the characteristics that have already been closed for processing by double-clicking them.

To save new results, choose *Close characteristics and save*. The system closes the characteristics that meet the requirements for being closed; the others are only saved. Your valuation is displayed in the table.

Recording Results for Inspection Lots in Tabular Form

1. Choose *Logistics → Quality management → Quality inspection,* and then either:

   − *Results → For all inspection lots*

   − *Worklist →Results recording → For all inspection lots*

   The system displays the selection screen for tabular results recording for several inspection lots.

2. Enter the required selection criteria.

   The system displays a list of inspection lots that meet the selection criteria.

3. Select the desired inspection lots, record the results, and save your entries using *Close characteristics and Save*.

Processing Inspection Lots Without Inspection Completion

Use

You can generate a list of inspection lots that have not yet been completed. For example, the worklist contains the following information for the selected inspection lots:

- Start date and end date for the inspection

  If the time period is exceeded, the corresponding date field is highlighted.

- Inspection lot number (highlighted if the inspection lot can be completed)

- Plant

- Processing status of the inspection lot

- Number of outstanding short-term characteristics

- Material description

For information about how to create a worklist for inspection lots that have not been completed, see Completing Inspections for Inspection Lots [Page 44].

Completing Inspections

1. Choose *Logistics → Quality management → Quality inspection → Worklist → Inspection lot completion → Inspection lots without inspection completion.*

    The screen for entering selection criteria appears.

2. Enter the desired selection criteria.

3. Choose one of the following functions:

    –   *Program → Execute*

    –   *Program → Execute and print*

    –   *Program → Execute in background*

    The system displays a list of inspection lots that correspond to the given selection criteria.

4. Select an inspection lot and choose *Execute*.

    The function for making a usage decision for the selected inspection lot is called up.

5. Enter the usage decision code for the inspection lot and save the data.

    The system returns to the worklist and displays the message that the usage decision for the lot has been saved.

Processing of Inspection Lots with Stock in Quality Inspection

Use

You can create a worklist for inspection lots with outstanding stock postings. This includes all inspection lots for which the lot quantity has not been completely posted to stock. You can select one, some, or all inspection lots from this list for which you want to update the stock posting. All changes to the inspection lot are made "with history."

The worklist includes only those inspection lots that are stock-relevant and for which at least short-term inspections have been completed. For example, the following information is displayed for the inspection lots:

- End date

    If the time period is exceeded, the corresponding date field is highlighted.

- Inspection lot

- Plant

- Outstanding quantity (highlighted, if the inspection has been completed and the usage decision has been made)

- Corresponding unit of measure

- Material short text

For more information about how to generate a worklist for inspection lots with stock postings, see Processing Inspection Lots with Stock in Quality Inspection. [Page 46]

Processing Inspection Lots with Stock in Quality Inspection

1. Choose *Logistics → Quality management → Quality inspection → Worklist → Inspection lot completion → With stock in quality inspection.*

    The screen for entering selection criteria appears.

2. Enter the desired selection criteria.

3. Choose one of the following functions:

    −   *Program → Execute*

    −   *Program → Execute and print*

    −   *Program → Execute in background*

    The system displays a list of inspection lots that correspond to the entered selection criteria. The inspection lots underlined in red have already been completed.

4. Select an inspection lot and choose *Execute*.

    The screen with the usage decision function for the chosen inspection lot appears.

5. To access the screen for stock postings, choose *Goto → Inspection lot stock.*

6. Make the necessary stock postings and save the data.

    The system returns to the worklist and displays the message that the stock posting has been made.

Processing Inspection Lots Without Usage Decisions

Use

You can use this function to generate a list of inspection lots for which you have not made a usage decision. You can then choose one, some, or all of the inspection lots, for which you want to enter a usage decision, from this list.

For example, the following information is contained for the inspection lot in the worklist:

- Start date and end date for the inspection

  If the time period is exceeded, the corresponding date field is highlighted.

- Inspection lot

- Plant

- Processing status of the inspection lot

- Number of outstanding characteristics **(short-term and long-term characteristics)**

- Indicator that specifies whether inspections have already been started and possibly completed

- Material short text

For more information about how to generate a worklist of inspection lots for which usage decisions have not been made, see .

Making Usage Decisions

1. Choose *Logistics → Quality management → Quality inspection → Worklist → Inspection lot completion → Inspection lots without usage decision.*

     The screen for entering selection criteria appears.

2. Enter the desired selection criteria.

3. Choose one of the following functions:

     –   *Program → Execute*

     –   *Program → Execute and print*

     –   *Program → Execute in background*

     The system displays a list of inspection lots that correspond to the given selection criteria.

4. Select an inspection lot and choose *Execute*.

     The function for making a usage decision for the chosen inspection lot is called up.

5. Enter the usage decision code for the inspection lot and save the data.

     The system returns to the worklist and displays the message that the usage decision for the lot has been saved.

Collective Usage Decision for Inspection Lots

Use

You can generate a list of inspection lots for which you should make a **collective usage decision**. The worklist includes all inspection lots for which:

- Characteristic processing is completed.

- No usage decision has been made.

- No characteristics have been rejected.

- No defects have been recorded.

For example, the system displays the following information for the inspection lots in the list:

- Start date and end date for the inspection

- Inspection lot

- Plant

- Processing status for the inspection lot (a maximum of two active statuses)

- Material number and material description

For information about how to generate a worklist of inspection lots for which you make a collective usage decision, see Making Collective Usage Decisions for Inspection Lots [Page 50].

Making a Collective Usage Decision for Inspection Lots

1. Choose *Logistics → Quality management → Quality inspection → Worklist → Inspection lot completion → Collective usage decision.*

   The screen for entering selection criteria appears.

2. Enter the desired selection criteria.

   You can also activate indicators to include skipped lots or long-term characteristics.

3. Enter the usage decision code that should be used as the collective usage decision for all chosen inspection lots. (Use the possible entries help if necessary.)

   If a stock proposal is linked to the chosen usage decision code, the system posts the stock accordingly.

4. Choose one of the following functions:

   − *Program → Execute*

   − *Program → Execute and print*

   − *Program → Execute in background*

   The system displays a list of inspection lots that correspond to the entered selection criteria.

5. Mark the inspection lots in the list for which you want to make a usage decision, and then choose one of the following functions:

   − *Make UD (foreground)*

   The system displays the initial screen for making a usage decision for each selected inspection lot. Choose *Continue* to make the usage decision and stock postings for the inspection lots.

   − *Make UD (background)*

   The system automatically makes a collective usage decision for all marked inspection lots in the background.

   − *Make UD manually*

   You must enter the usage decision for each selected inspection lot manually.

Mass Maintenance of Physical-Sample Storage Data

Use

Using this function, you can globally maintain the storage data for a selection of physical samples. This function is implemented in a report that allows you to:

- Select the physical samples for which you want to maintain the storage data

- Enter the new storage data to be maintained for the selected physical samples

The fields for entering the storage data in this report are identical to the fields in the physical-sample record. You can maintain data for the standard storage data fields, as well as any customer-specific fields you may have included in the physical-sample record.

The system copies all of the storage data you maintain in this report into the respective physical-sample records **exactly as you enter it**.

⚠️

> If you leave a field **blank** when maintaining the storage data in this report and one or more of the selected physical-sample records contain data in the corresponding field, the system **deletes** the existing data in the physical-sample records.

Features

Executing the report

You can execute this report in two different ways. Depending on the setting of the *No list display* indicator in the selection screen, the system can:

- Display the list of the physical samples you selected **before** it copies the storage data into the respective physical-sample records (*No list display* indicator is **not** set)

  In this case, the system copies the data into the physical-sample records when you choose *Save* in the list screen.

- Suppress the list of physical samples you selected (*No list display* indicator **is** set)

  In this case, the system copies the data into the physical-sample records **as soon as you choose** *Execute* in the selection screen.

Physical samples in a list

If you execute the report with a list display, the system displays all selected physical samples.

You can only change the status of a physical sample if the **current** status of the sample permits it. If the status of a physical sample does not allow a status change, the physical sample will still be included in the list, since you can change the remaining storage data independently of the status.

Monitor function in a list

If you execute the report with a list display, the system displays a traffic light next to each physical sample. The traffic light colors have the following meaning:

Color	Meaning

Mass Maintenance of Physical-Sample Storage Data

Green	The storage data has changed for the physical sample. You can save all changes to the physical-sample storage data.
Yellow	The storage data has not changed (this means that the data you maintained was the same as the data previously contained in the physical-sample record)
Red	• The storage data could not be changed because: – Physical sample could not be locked – Physical sample is currently locked and is being processed – Physical-sample location is not compatible with storage location • The storage data could not be **completely** changed because the desired status change is not allowed; all other data, however, can be changed.

Activities

1. To display the selection screen for this report, choose *Logistics → Quality management → Quality inspection → Sample management → Physical sample → Maintain storage data*.

2. Enter your selection criteria in the top screen block, the storage data you wish to maintain in the *Storage data* tab, and make sure you set the *No list display* indicator appropriately.

3. Choose *Execute* to execute the report.

   If the system does not display a list of physical samples, the storage data is changed immediately. If a list is displayed, you can also choose the following functions in the list:

   – Display a physical sample record

   – Display a detailed summary of the physical-sample data

   – Save the changes

Automatic Usage Decisions for Inspection Lots

Use

If the goods in an inspection lot are without defects, the system can complete the inspection automatically. The system performs the following tasks when it makes an automatic usage decision:

- Completes the inspection lot

- Makes the usage decision

- The relevant stock postings are performed. Releases the goods from inspection stock.

Manual Triggering of an Automatic Usage Decision

You can manually generate a list of inspection lots that are defined for an automatic usage decision. (If you want to use the same selection criteria more than once, you can define a report variant.) For more information, see Manually Triggering an Automatic Usage Decision for Inspection Lots. [Page 54]

> Inspection lots for orders are inspection lots with origins:
>
> – 03 (lots for production orders)
> – 13 (lots for run schedule headers)
> – 14 (lots for maintenance orders)
>
> Inspection lots with a different origin are generally called inspection lots.

Job Planning and Execution

You can use the job planning and execution functions to have the system trigger source inspections automatically at predefined intervals.

See also:

Automatic Usage Decisions [Ext.]

Manually Triggering an Automatic Usage Decision

1. Choose *Logistics → Quality management → Quality inspection*.

To	Choose
Manually trigger an automatic usage decision for an inspection lot of origin *03,13,14*	*Worklist → Inspection lot completion → Automatic UD (orders) → Trigger manually*
Manually trigger an automatic usage decision for an inspection lot with a different origin	*Worklist → Inspection lot completion → Automatic UD (general) → Trigger manually*

   The screen for entering selection criteria appears.

2. Enter the desired selection criteria.

3. Choose one of the following functions:

   − *Program → Execute*

   − *Program → Execute and print*

   − *Program → Execute in background*

   The system displays a list of inspection lots that have been processed for the automatic usage decision. Information is also displayed about the usage decision, status and stock postings for the inspection lots.

The Calculation and Settling of Costs for QM Orders

Use

- You can determine and calculate the costs linked to QM orders using the worklist function.

For more information about using these functions, see the *Controlling* (CO) documentation CO Internal Orders [Ext.].

Activities

Depending on your requirements, use this function by choosing either:

- *Calculate QM order → Extras*

- *Calculate QM order → Settlement*