



**Version**

**8.5**

PENTAGON 2000 SOFTWARE

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**Quality CAR Module**

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<b>TITLE:</b>	Quality CAR Module		
<b>PART:</b>	Quality Assurance		
<b>MODULE:</b>	Quality CAR	<b>BUILD</b>	8.5.54.95
<b>RESPONSIBILITY:</b>	Procedures Specialist, Pentagon 2000	<b>REVISION:</b>	01
<b>APPROVED BY:</b>	Vice President, Operations, Pentagon 2000	<b>EFFECTIVE DATE:</b>	08/09/2012

### Purpose

The Quality CAR module will enable your organization to keep record of discrepancies in your business processes, failures in your quality system, health and safety incidents and the corrective action that was taken to resolve each of those issues. This module allows you to assign a status and priority to each corrective action report and the Quality CAR search window allows users to quickly identify corrective action reports that need to be completed or those that require follow up. . To facilitate trend analysis, you may categorize each discrepancy and corrective action. An unlimited number of existing documents (sales, purchasing, materials, flight operations, work order, maintenance) can be linked to a corrective action report to provide backup for the discrepancy or the corrective action. The user can also attach scanned documents, images, or videos to each corrective action report.

The Quality CAR module will also enable the creation of quality inspection checklists that may be attached to purchase receivers, sales receivers, RMAs, and warehouse transfers to ensure proper inspection of materials. The quality inspection checklists can be customized by part number and category. The results of the quality inspections can be exported to a CSV file for a particular part number or sales pick ticket.

### Overview

This procedure outlines the steps for creating, editing, and deleting corrective action reports to track discrepancies, failures, or incidents and the solutions (or corrective action) to those discrepancies, failures, or incidents. This procedure also outlines instructions for administrative setup of, navigation in, and printing from the Quality CAR module.

### Required Modules

- Quality CAR

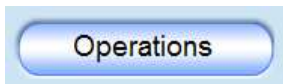
**Table of Contents**

<b>1. CREATING A NEW CORRECTIVE ACTION REPORT.....</b>	<b>4</b>
<b>2. EDITING AN EXISTING CORRECTIVE ACTION REPORT: .....</b>	<b>18</b>
<b>3. DELETING AN EXISTING CORRECTIVE ACTION REPORT:.....</b>	<b>20</b>
<b>4. QUALITY CAR SETUP.....</b>	<b>21</b>
<b>5. SEARCH WINDOW .....</b>	<b>22</b>
<b>6. PRINTING .....</b>	<b>24</b>
<b>7. QUALITY INSPECTION CHECKLIST SETUP .....</b>	<b>25</b>
A. SYSTEM DEFAULT .....	25
B. PART NUMBER CATEGORY.....	26
C. PART NUMBER .....	29
D. QUALITY INSPECTION CHECKLIST LINES .....	32
<b>8. COMPLETING QUALITY INSPECTION CHECKLISTS .....</b>	<b>35</b>
<b>9. DATA EXPORT .....</b>	<b>38</b>
A. EXPORT FILE SETUP .....	38
B. EXPORT FOR A PART NUMBER.....	40
C. EXPORT FOR A PICK TICKET .....	42

## Procedure

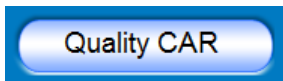
### 1. Creating a New Corrective Action Report

- a. Open the Quality CAR module.
  - i. From the main menu screen:
    1. Left-click the **Operations** button.



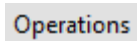
**NOTE:** The **Operations** button is located in the center column of buttons in the main menu screen.

2. The **Operations Menu** window will open. Left-click the **Quality CAR** button.

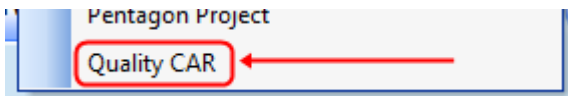


**NOTE:** The **Quality CAR** button is located in the right column of buttons in the **Operations Menu** window.

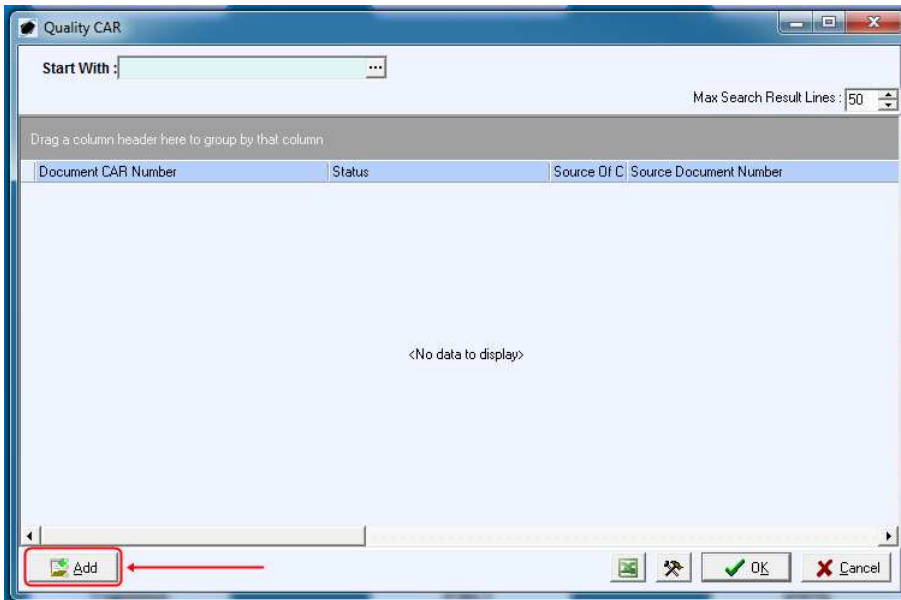
- ii. From the toolbar:
    1. Left-click **Operations** from the toolbar.



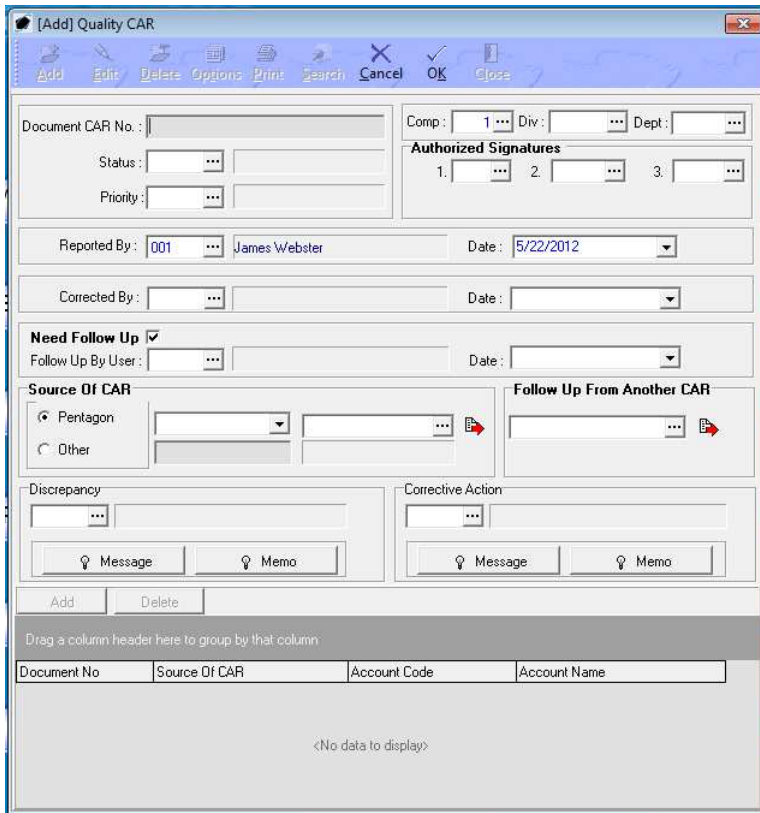
2. Left-click **Quality CAR**.



b. The **Quality CAR** window will appear. Left-click the **Add** button.



- c. The **[Add] Quality CAR** window will appear.



- d. Note that the **Document CAR No** field is inactive. The system will assign a number to the corrective action report once the record is created (when the **OK** button is selected).

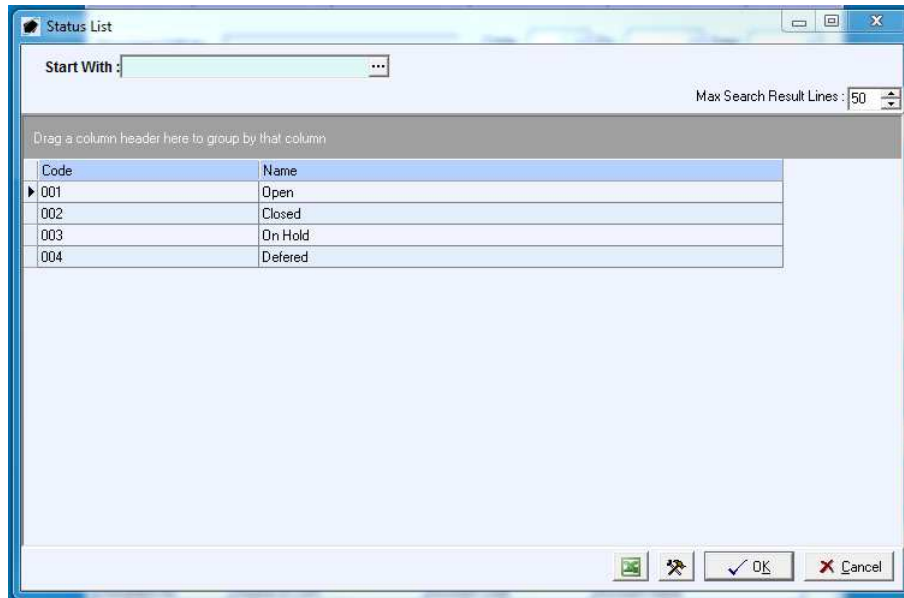
- e. Identify the status of the corrective action report.



- i. Left-click the ellipses **...** in the **Status** field.

- ii. The **Status List** window will appear.

**NOTE:** The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization. Instructions for identifying the values appropriate to your organization may be found in the Setup section of this procedure.



- iii. Select the appropriate status (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

- f. Identify the priority of the corrective action report.

Document CAR No. :

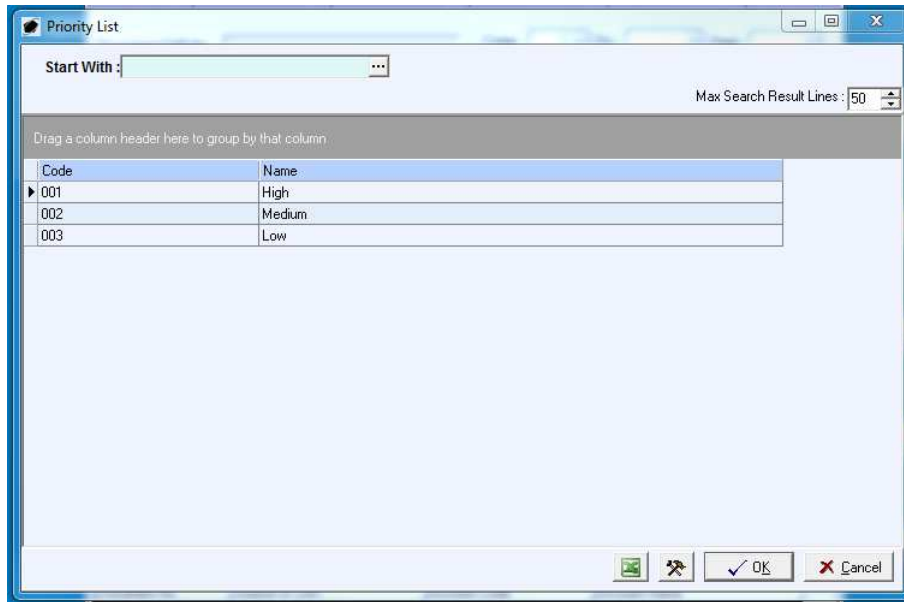
Status :

Priority :

- i. Left-click the ellipses  in the **Priority** field.

- ii. The **Priority List** window will appear.

**NOTE:** The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization. Instructions for identifying the values appropriate to your organization may be found in the Setup section of this procedure.



- iii. Select the appropriate priority (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

- g. Identify the company associated with the corrective action report.

Comp : 1 ... Div : ... Dept : ...

- i. Left-click the ellipses **...** in the **Comp** field.
- ii. The **Company List** window will appear.
- iii. Select the appropriate company (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

- h. Identify the division associated with the corrective action report (if applicable).


Comp : 1 ... Div : ... Dept : ...

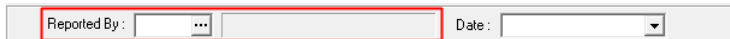
- i. Left-click the ellipses **...** in the **Div** field.
- ii. The **Division List** window will appear.
- iii. Select the appropriate division (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).




- i. Identify the department associated with the corrective action report (if applicable).

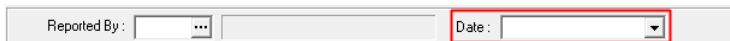


- i. Left-click the ellipses  in the **Dept** field.
  - ii. The **Department List** window will appear.
  - iii. Select the appropriate department (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- j. Identify the individual who reported the discrepancy, failure, or incident.




**NOTE:** The system will automatically identify the user that is logged in when a new corrective action report as the individual who reported the discrepancy, failure, or incident; however, it may be changed at any time.

- i. Left-click the ellipses  in the **Reported By** field.
  - ii. The **Users List** window will appear.
  - iii. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- k. Identify the date on which the discrepancy, failure, or incident was reported.



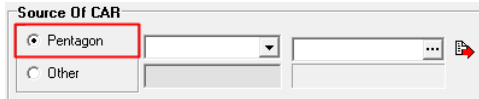
**NOTE:** The system will automatically identify the current date as the date on which the discrepancy, failure, or incident was reported; however, this may be changed at any time.

- i. Left-click the drop-down arrow  in the **Date** field.
  - ii. A calendar widget will appear.
  - iii. Left-click the appropriate date.
- l. Identify the primary source of the corrective action report.

**NOTE:** The corrective action report may be associated with multiple documents within the system or may be associated with an **Other** category.


- i. If the primary source of the corrective action report is a document within the system:

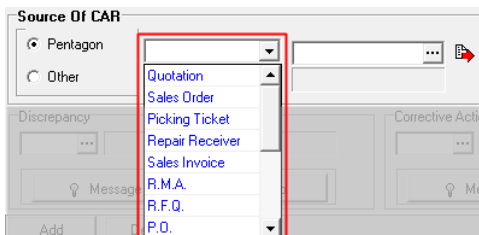
1. Left-click the radio button to the left of the **Pentagon** label.




The screenshot shows a form titled "Source Of CAR". It has two radio buttons: "Pentagon" (which is selected and highlighted with a red box) and "Other". To the right of the "Pentagon" radio button is a dropdown menu and a field with an ellipsis icon and a red arrow icon.

**NOTE:** The primary source of the corrective action may be identified as associated with any of the following documents: Quote, Sales Order, Sales Receiver, Sales Pick Ticket, Sales Invoice, RMA, RFQ, Purchase Order, Purchase Shipper, Purchase Receiver, Purchase Invoice, Claim, Flight Log, Work Order, Maintenance, Material Requisition.

2. Left-click the drop-down arrow  in the field to the right of the **Pentagon** label and select the appropriate document type from the drop down menu.



The screenshot shows the "Source Of CAR" form with the dropdown menu open. The menu lists several document types: Quotation, Sales Order, Picking Ticket, Repair Receiver, Sales Invoice, R.M.A., R.F.Q., and P.O. The "Pentagon" radio button is still selected.

3. Left-click the ellipses  in the field to the right of the document field.




The screenshot shows the "Source Of CAR" form with the ellipsis icon in the field to the right of the document field highlighted with a red box.

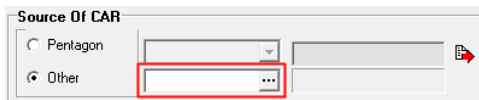
4. A list of the documents that are of the type previously selected will appear.
  5. Select the appropriate document (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- ii. If the primary source of the corrective action report is external to the system, it may be categorized by an **Other** category.

1. Left-click the radio button to the left of the **Other** label.



The screenshot shows the "Source Of CAR" form with the "Other" radio button selected and highlighted with a red box.

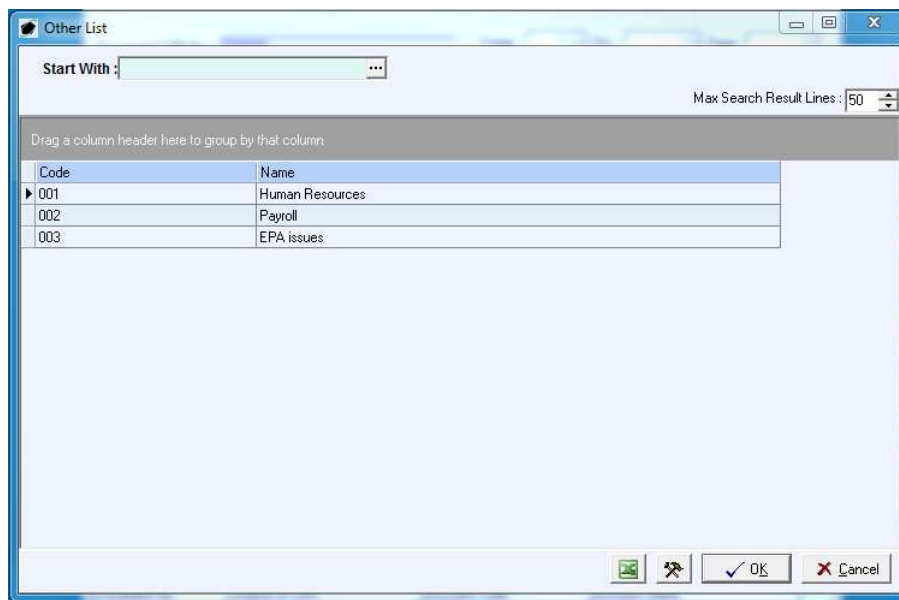
2. Left-click the ellipses  in the field to the right of the **Other** label.



The screenshot shows the "Source Of CAR" form with the ellipsis icon in the field to the right of the "Other" label highlighted with a red box.


3. The **Other List** window will appear.


**NOTE:** The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization. Instructions for identifying the values appropriate to your organization may be found in the Setup section of this procedure.

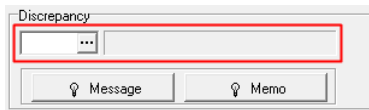


4. Select the appropriate category (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- m. If the new corrective action report is being created as a follow up action to a previously created corrective action report, identify the existing corrective action report that the new corrective action report should be associated with.



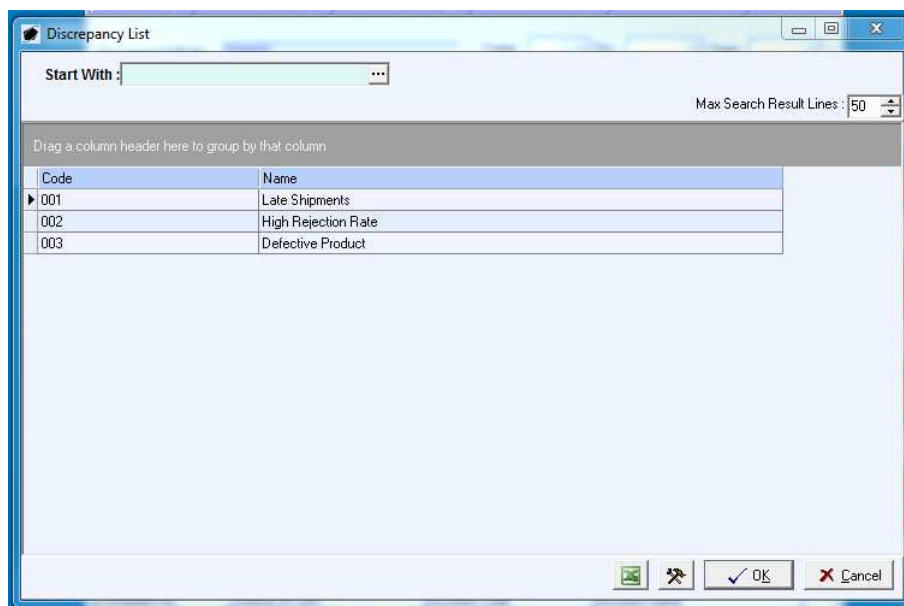
- i. Left-click the ellipses  in the field within the **Follow Up From Another CAR** group box.
  - ii. The **Quality CAR** window will appear.
  - iii. Select the appropriate corrective action report (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- n. Identify the discrepancy, failure, or incident information:
- i. Identify the discrepancy category:

1. Left-click the ellipses  in the field within the **Discrepancy** group box.

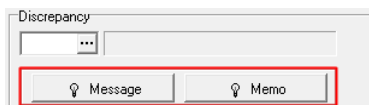


2. The **Discrepancy List** window will appear.

**NOTE:** The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization. Instructions for identifying the values appropriate to your organization may be found in the Setup section of this procedure.

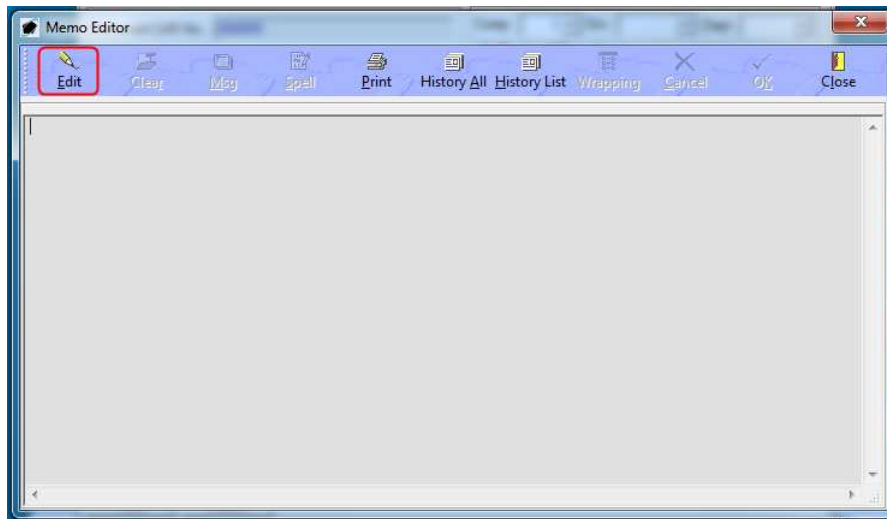


- ii. Identify details of the discrepancy, failure, or incident:
  1. Left-click either the **Message** or **Memo** button.




**NOTE:** The **Message** field is generally used for information that can be shared external to the organization; the **Memo** field is generally used for information that is shared only internal to the organization. Information may be saved in both fields.

2. The **Memo Editor** window will appear. Left-click the **Edit** button to add details related to the discrepancy, failure, or incident.



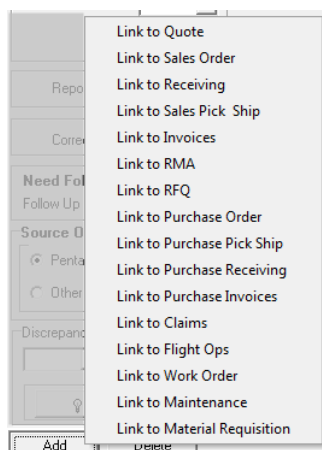
3. Left-click the **OK** button to save the text.
4. Left-click the **Close** button to close the **Memo Editor** window.

**NOTE:** When text has been saved, the light bulb on that button  will be highlighted in yellow.

- o. Identify additional documents associated with the corrective action report (if applicable):

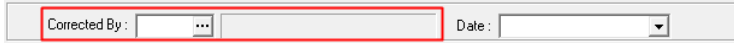
**NOTE:** An unlimited number of documents may be associated with a single corrective action report.

- i. Left-click the **Add** button and left-click the appropriate document type.



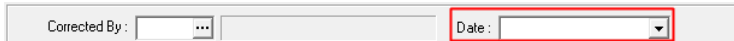
- ii. A list of the documents that are of the type previously selected will appear.
- iii. Select the appropriate document (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).

- p. Identify the individual who corrected the discrepancy, failure, or incident.



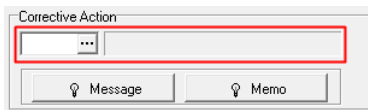
Corrected By:  ... Date:

- i. Left-click the ellipses  in the **Corrected By** field.
  - ii. The **Users List** window will appear.
  - iii. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- q. Identify the date on which the discrepancy, failure, or incident was corrected.



Corrected By:  ... Date:

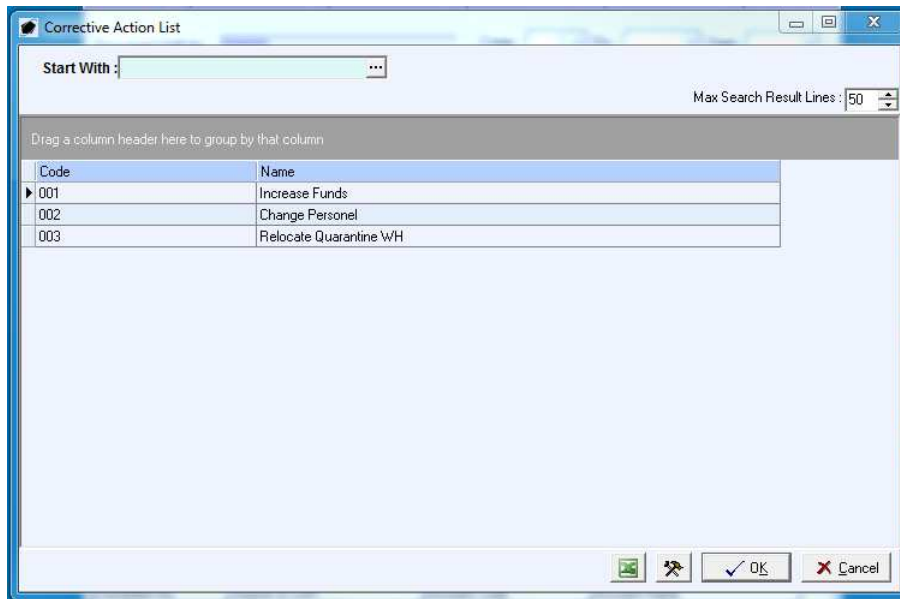
- i. Left-click the drop-down arrow  in the **Date** field.
  - ii. A calendar widget will appear.
  - iii. Left-click the appropriate date.
- r. Identify the corrective action information:
- i. Identify the corrective action category:
    1. Left-click the ellipses  in the field within the **Corrective Action** group box.



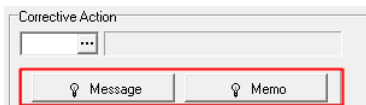
Corrective Action  
 ...  
Message Memo

2. The **Corrective Action List** window will appear.

**NOTE:** The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization. Instructions for identifying the values appropriate to your organization may be found in the Setup section of this procedure.

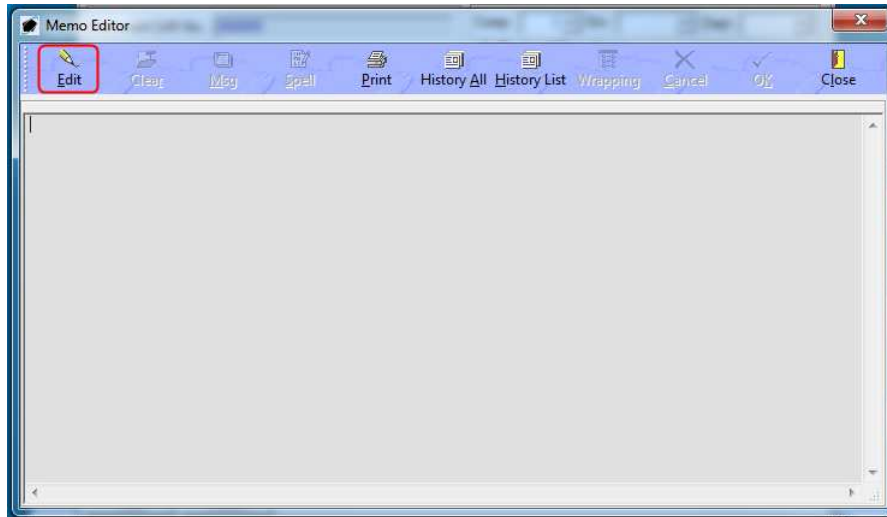


- ii. Identify details of the corrective action:
  1. Left-click either the **Message** or **Memo** button.




**NOTE:** The **Message** field is generally used for information that can be shared external to the organization; the **Memo** field is generally used for information that is shared only internal to the organization. Information may be saved in both fields.

2. The **Memo Editor** window will appear. Left-click the **Edit** button to add details related to the discrepancy, failure, or incident.



3. Left-click the **OK** button to save the text.
4. Left-click the **Close** button to close the **Memo Editor** window.

**NOTE:** When text has been saved, the light bulb on that button  will be highlighted in yellow.

- s. Identify whether the corrective action report requires follow up.


**NOTE:** The system will automatically mark the **Need Follow Up** checkbox as "checked" to indicate that the corrective action report requires follow up.

If no follow up is required, ensure the checkbox to the right of the Need Follow up label is marked as "unchecked."

- t. Identify the individuals who signed off, approved, or authorized the corrective action report.


**NOTE:** These fields may be used for the identification of individuals involved in the corrective action report approval process. Each organization may identify a specific purpose for each authorized signature in the organization's business process. These fields are for reference and custom reporting purposes only.


**NOTE:** In Build 8.5.54.95 and earlier, there is no option to require that individuals must enter their password when their user code is selected as an authorized signature.

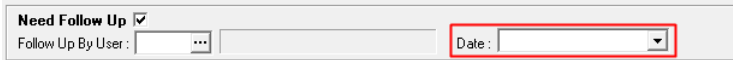
- i. Left-click the ellipses  in each authorized signature field (if applicable).




- ii. The **Users List** window will appear.
- iii. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- u. Once follow up has been accomplished, identify the individual who performed the follow up actions:



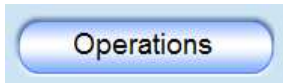
- i. Left-click the ellipses  in the **Follow Up By User** field.
- ii. The **Users List** window will appear.
- iii. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- v. Identify the date on which the follow up actions were accomplished.



- i. Left-click the drop-down arrow  in the **Date** field.
- ii. A calendar widget will appear.
- iii. Left-click the appropriate date.
- w. Left-click the **OK** button to save the corrective action report record.

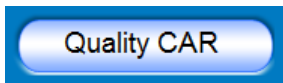
## 2. Editing an existing corrective action report:

- a. Open the Quality CAR module.
  - i. From the main menu screen:
    1. Left-click the **Operations** button.



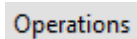
**NOTE:** The **Operations** button is located in the center column of buttons in the main menu screen.

2. The **Operations Menu** window will open. Left-click the **Quality CAR** button.

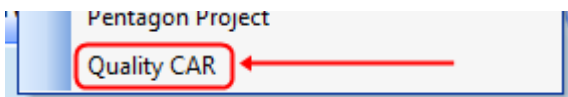


**NOTE:** The **Quality CAR** button is located in the right column of buttons in the **Operations Menu** window.

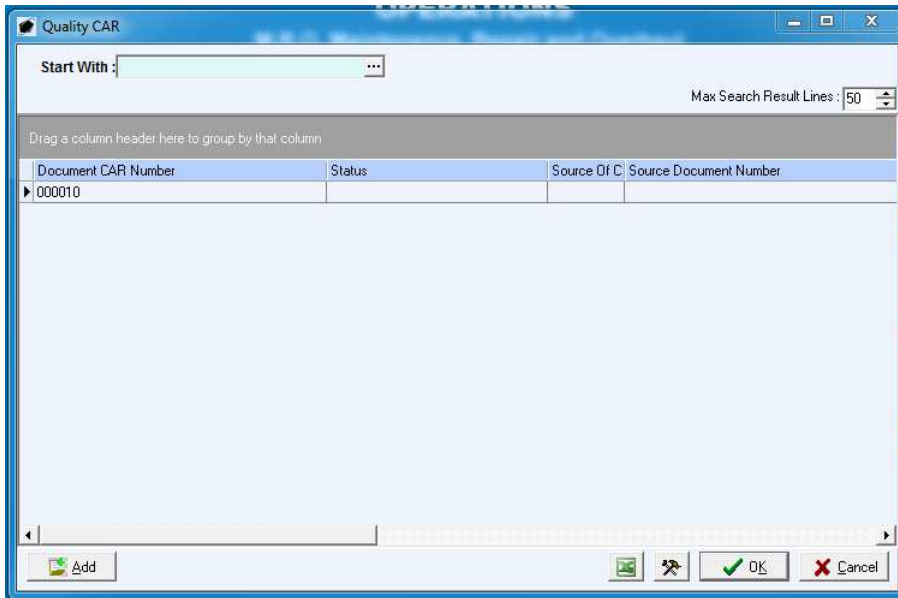
- ii. From the toolbar:
    1. Left-click **Operations** from the toolbar.



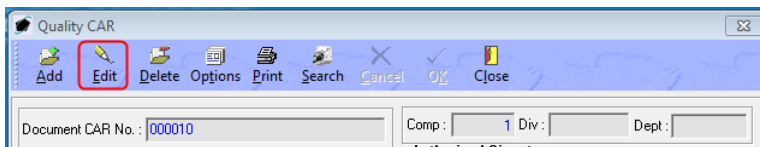
2. Left-click **Quality CAR**.



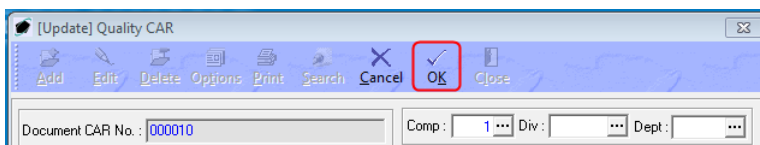
- b. The **Quality CAR** window will appear.



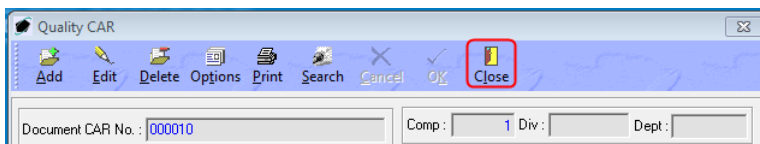
- c. Select the appropriate corrective action report (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- d. The **Quality CAR** window will appear. Left-click the **Edit** button to edit any field or link associated with the record.



- e. The window title bar will display **[Update] Quality CAR** to indicate that the record is in edit mode and is locked for editing by any other user. Once all changes have been made, left-click the **OK** button to save the corrective action report record.

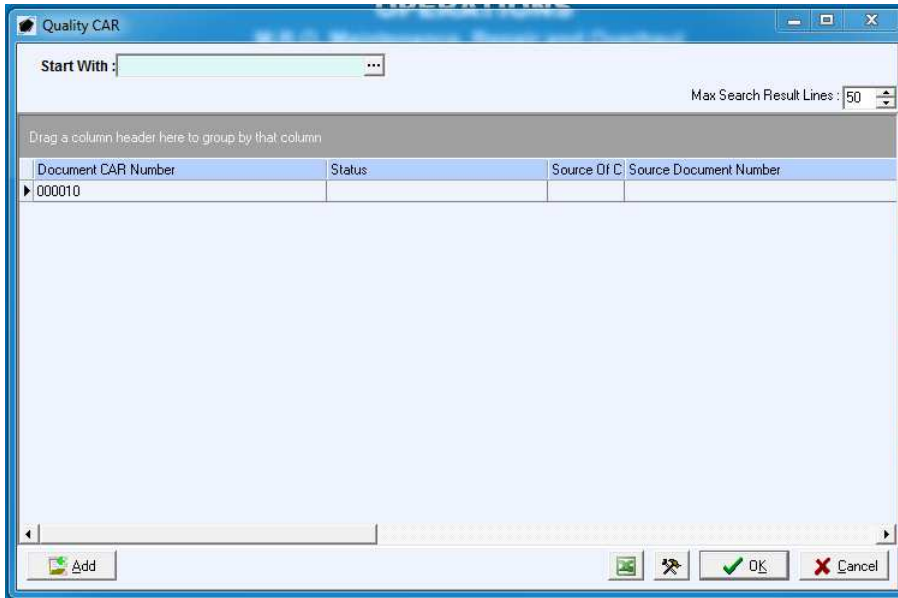


- f. Left-click the **Close** button to close the **Quality CAR** window.

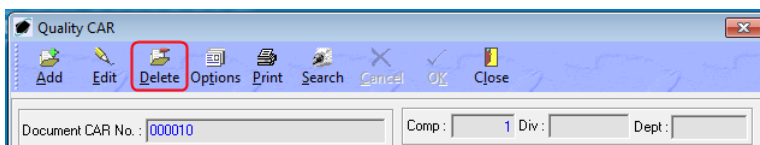


3. **Deleting an existing corrective action report:**

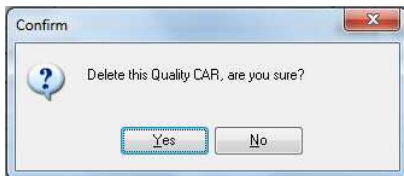
- a. Open the Quality CAR module.
- b. The **Quality CAR** window will appear.



- c. Select the appropriate corrective action report (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- d. The **Quality CAR** window will appear. Left-click the Delete button to delete the corrective action report record.



- e. A **Confirm** dialog box will appear.



- f. Left-click the **Yes** button.

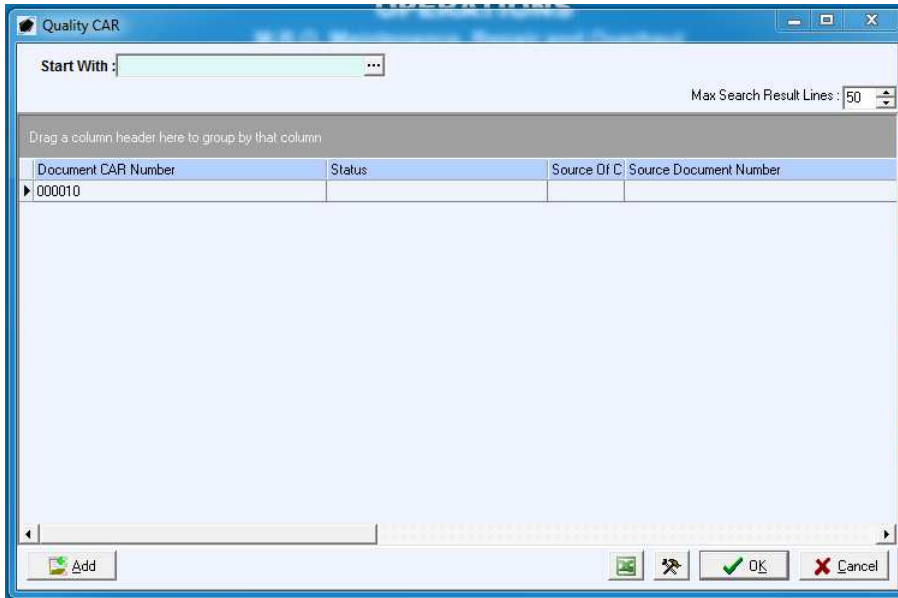
#### 4. Quality CAR Setup

There are several tables that must be setup in order to fully utilize the **Quality CAR** module.

- a. Users List - to complete the **Reported By, Corrected By, Follow Up By User,** and **Authorized Signature** fields, the appropriate users must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.
- b. Status List - to complete the **Status** field, the appropriate statuses must be listed in the **Status List**. To access this table, left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection Tables Setup - All Tables**, left-click **Status**. Status codes may be added by left-clicking the **Add** button in the lower left of the **Status List**.
- c. Priority List - to complete the **Priority** field, the appropriate priorities must be listed in the **Priority List**. To access this table, left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection Tables Setup - All Tables**, left-click **Priority**. Priority codes may be added by left-clicking the **Add** button in the lower left of the **Priority List**.
- d. Other List - to complete the **Other** field, the appropriate categories must be listed in the **Other List**. To access this table, left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection Tables Setup - All Tables**, left-click **Other**. Other category codes may be added by left-clicking the **Add** button in the lower left of the **Other List**.
- e. Discrepancy List - to complete the **Discrepancy** field, the appropriate discrepancy, failure, or incident must be listed in the **Discrepancy List**. To access this table, left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection Tables Setup - All Tables**, left-click **Discrepancy**. Discrepancies, failures, or incidents may be added by left-clicking the **Add** button in the lower left of the **Discrepancy List**.
- f. Corrective Action List - to complete the **Corrective Action** field, the appropriate corrective actions must be listed in the **Corrective Action List**. To access this table, left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection Tables Setup - All Tables**, left-click **Corrective Action**. Corrective actions may be added by left-clicking the **Add** button in the lower left of the **Corrective Action List**.

## 5. Search Window

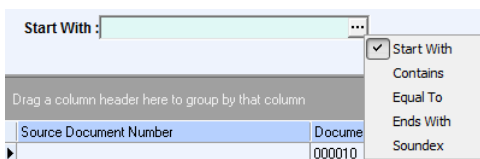
- a. Open the Quality CAR module.
- b. The **Quality CAR** window will appear.



- c. The **Quality CAR** search window may be filtered in three different ways:
  - i. The column in the left-most position of the grid may be filtered by text.
    1. The following columns of the grid may be filtered by text:
      - a. Document CAR No
      - b. Source Document Number
      - c. Follow Up By User
    2. Type a value into the field at the top of the search window.

Start With :  ...

**NOTE:** There are several options on how the text filters the column.



**Start With** - the text must begin with the string of characters typed into the field in order to show up in the grid.

**Contains** - the text must contain the string of characters typed into the field in order to show up in the grid.

**Equal To** - the text must exactly match the string of characters typed into the field in order to show up in the grid.

**Ends With** - the text must end with the string of characters typed into the field in order to show up in the grid.

**Soundex** - the text must sound like the string of character typed into the field in order to show up in the grid.

3. The results in the grid will include only those that match the criteria outlined by the field at the top of the search window.
- ii. Some columns allow the user to select one or more options from a list:
1. The following columns of the grid may be filtered by selection:
    - a. Source of CAR (Quote, Sales Order, Sales Receiver, Sales Pick Ticket, Sales Invoice, RMA, RFQ, Purchase Order, Purchase Shipper, Purchase Receiver, Purchase Invoice, Claim, Flight Log, Work Order, Maintenance, Material Requisition)
    - b. Need a Follow Up (Yes, No)
  2. Left-click the column header and the filter selection list will appear. Left-click the values that should be displayed in the grid. Multiple values may be selected by repeating this step.
  3. Records that have fields matching the values displaying a check mark  to the left of the selection will be displayed in the grid; records that have fields matching the values not displaying a check mark to the left of the selection will not be displayed in the grid.
- iii. The remaining columns allow the user to identify a range of values that should be displayed in the grid.
1. Left-click the column header and a window will appear that will allow the input of a **Start/From** value and a **End/To** value.
  2. Records that have fields between the values identified in the filter window will be displayed in the grid. If only a **Start/From** value is entered, then all records having fields equal to or greater than the **Start/From** value will be displayed in the grid. If only a **End/To** value is entered, then all records having fields equal to or less than the **End/To** value will be displayed in the grid.
  3. To remove the range filter, left-click the column header. When the filter window appears, left-click the **Cancel** button.

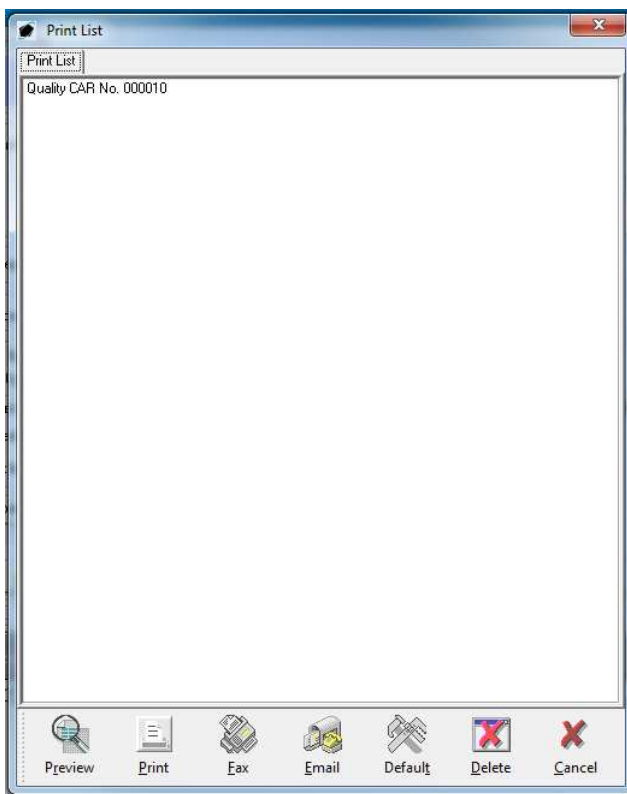
## 6. Printing

- a. Open the Quality CAR module.
- b. The **Quality CAR** window will appear.
- c. Select the appropriate corrective action report (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- d. The **Quality CAR** window will appear. Left-click the **Print** button.



**NOTE:** The applicable ServerNET or ServerServiceNET must be running in order to print.

- e. The **Print List** print window will appear.



- f. Left-click the **Preview** button to print the form to the screen.
- g. Left-click the **Print** button to print the form to the printer.



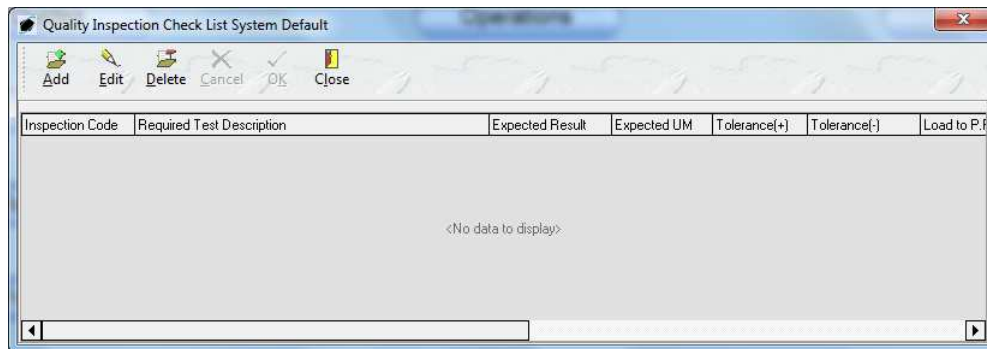
## 7. Quality Inspection Checklist Setup

The Quality CAR module enables the creation of quality inspection checklists that can be used to ensure that material being received meets the requirements of your organization. Quality inspection checklists may be created for a specific part number or category. A default quality inspection checklist will be used for items for which there does not exist a checklist for the item's part number or category.

### a. System Default

The system default quality inspection checklist is the most general of the possible quality inspection checklists and will be linked to appropriate transactions where an item is received, but quality inspection checklists do not exist for the category to which the item is assigned or the particular part number of the item.

- i. Left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection List Defaults - All Defaults**, left-click **Quality Inspection Checklist - System Default**. The **Quality Inspection Check List System Default** window will appear.



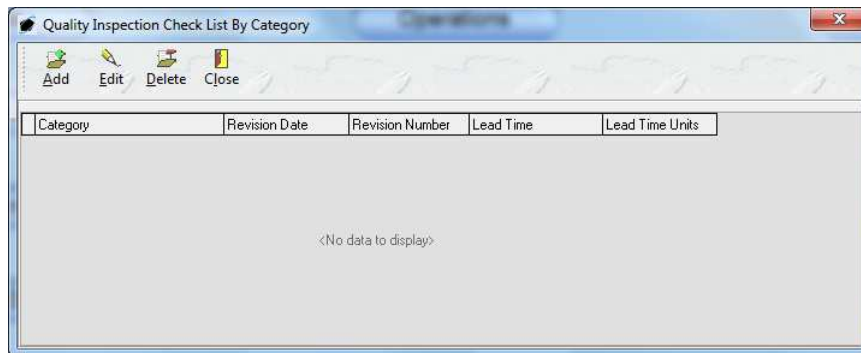
- ii. A list of inspections is maintained in The **Quality Inspection Check List System Default** window. Adding, modifying, and deleting inspections to the quality inspection checklists will be discussed later in the procedure as it applies to all checklist types (system default, part number category, part number).

b. **Part Number Category**

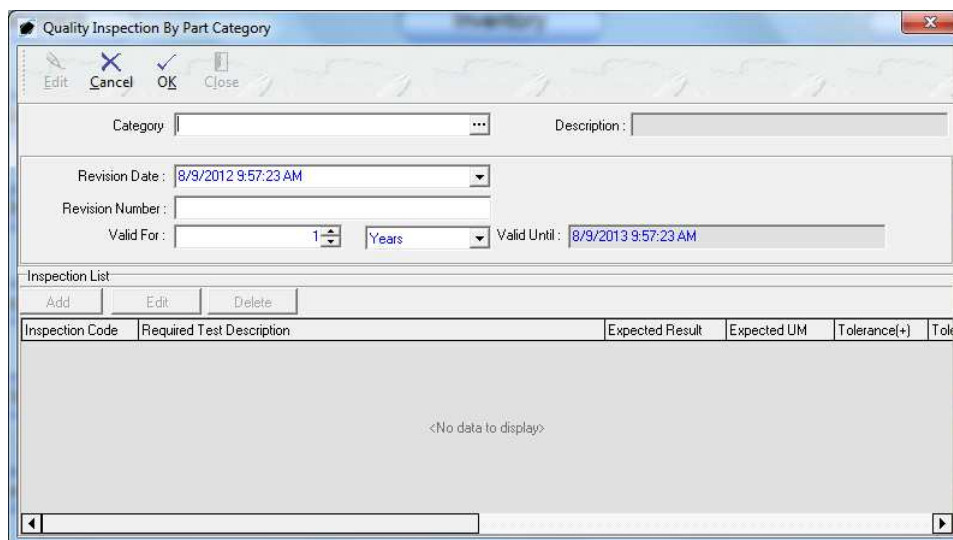
The part number category quality inspection checklist will be linked to appropriate transactions where an item assigned to a corresponding category is received and a quality inspection checklist for the particular part number of the item does not exist.

**NOTE:** If a quality inspection checklist does not exist for the category to which an item being received is assigned, then the system default quality inspection checklist will be attached to that transaction.

- i. Left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection List Defaults - All Defaults**, left-click **Quality Inspection Checklist - By Part Number Category** . The **Quality Inspection Check List By Category** window will appear.




- ii. The list of categories for which custom quality inspection checklists exist is maintained in **The Quality Inspection Check List By Category** window.
- iii. Adding a Category
  1. Left-click the **Add** button in the **Quality Inspection Check List By Category** window toolbar. The **Quality Inspection By Part Category** window will appear.




2. Header

- a. **Category** - Identify the category for which the quality inspection checklist will be created.



**NOTE:** To complete the **Category** field, the appropriate category must be listed in the **Inventory Category List**. To access this table, left-click **Administration** from the toolbar, go to **Stock Tables List by Code**, and left-click **Inventory Category**.

- i. Left-click the ellipses  in the **Category** field.
- ii. The **Inventory Category List** search window will appear.
- iii. Select the appropriate category (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- b. **Description** - Displays the description of the category from the **Inventory Category List**.
- c. **Revision Date** - Identify the date on which the quality inspection checklist associated with the category was last revised.

**NOTE:** The default value in the **Revision Date** is the date and time that the category record was created.

- i. Left-click the drop down arrow  in the **Revision Date** field.
- ii. The date widget will appear.
- iii. Left-click the date that corresponds to the date from which the statistics should begin being compiled.
- iv. Left-click the **OK** button in the lower right-hand corner of the date widget.
- d. **Revision Number** - Identify the number of the revision.
- e. **Valid For** - Identify the period of time for which the inspection checklist is valid.

**NOTE:** The default value in the **Valid For** field is "1" and the default value for the unit of measure associate with the **Valid For** field is "Years".

- i. **Valid For** - Left-click the cursor into the field directly to the right of the Lead Time label and enter the number that corresponds to the lead time unit of measure. The spinner arrows  may also be used to adjust the number in whole number increments.
- ii. **Valid For** unit of measure - Left-click the drop-down arrow  in the field to the right of the lead time field and select the appropriate unit of measure type from the drop down menu.

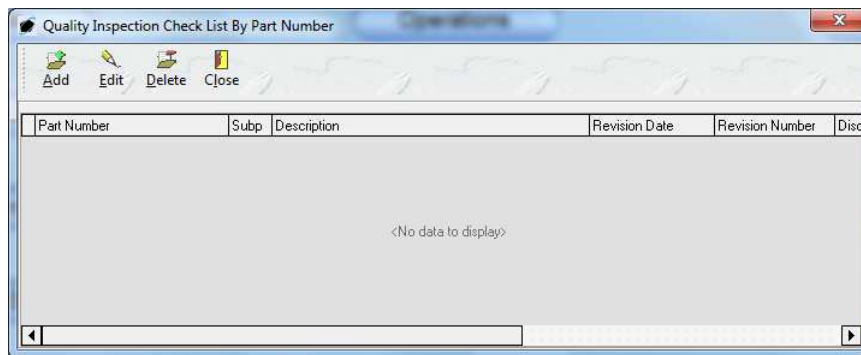
- f. **Valid Until**- The date on which the quality inspection checklist will no longer be valid or should be reviewed.
  3. Left-click the **OK** button in the **Quality Inspection By Part Category** window toolbar to save the record and enable the buttons within the **Inspection List** grid.
  4. **Inspection List** grid - Adding, modifying, and deleting inspections to the quality inspection checklists will be discussed later in the procedure as it applies to all checklist types (system default, part number category, part number)
- iv. **Modifying a Category**
  1. Left-click the line within the grid on the **Quality Inspection Check List By Category** window that corresponds to the category for which the quality inspection checklist should be modified.
  2. Left-click the **Edit** button in the **Quality Inspection Check List By Category** window toolbar. The **Quality Inspection By Part Category** window will appear.
  3. After the appropriate modifications are completed, left-click the **OK** button on the **Quality Inspection By Part Category** window toolbar to save the modifications to the record.
- v. **Deleting a Category**
  1. Left-click the line within the grid on the **Quality Inspection Check List By Category** window that corresponds to the category for which the quality inspection checklist should be deleted.
  2. Left-click the **Delete** button in the **Quality Inspection Check List By Category** window toolbar. A **Confirm** dialog box will appear to confirm that the category should be deleted.
  3. Left-click the **Yes** button to confirm the deletion.

c. **Part Number**

The part number quality inspection checklist will be linked to appropriate transactions where an item with a particular part number is received.

**NOTE:** If a quality inspection checklist does not exist for the part number of the item being received, then the system will link the quality inspection checklist associated with the category associated with the item. If a quality inspection checklist does not exist for the category associated with the item being received, then the system default quality inspection checklist will be attached to that transaction.

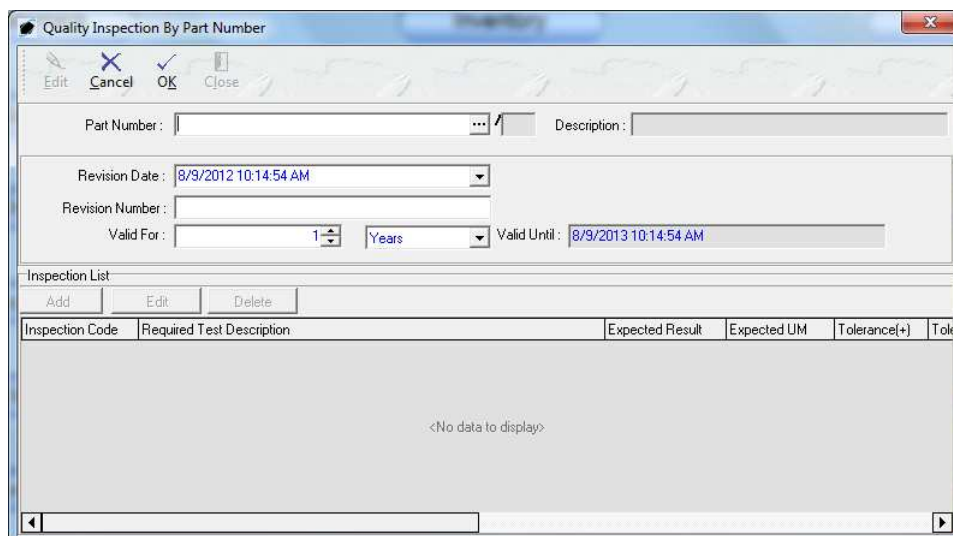
- i. Left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection List Defaults - All Defaults**, left-click **Quality Inspection Checklist - By Part Number** . The **Quality Inspection Check List By Part Number** window will appear.



- ii. The list of part numbers for which custom quality inspection checklists exist is maintained in **The Quality Inspection Check List By Part Number** window.

iii. Adding a Part Number



- 1. Left-click the **Add** button in the **Quality Inspection Check List By Part Number** window toolbar. The **Quality Inspection By Part Number** window will appear.





2. Header

- a. **Part Number** - Identify the part master record for which the quality inspection checklist will be created.

**NOTE:** To complete the **Part Number** field, the appropriate part master record must exist. Instructions on creating a part master record may be found in the procedure "Creating a Part Master Record" in the Material Management section of this manual.

- i. Left-click the ellipses  in the **Part Number** field.
- ii. The **Partnumber** search window will appear.
- iii. Select the appropriate part number (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- b. **Description** - Displays the description of the category from the part master record.
- c. **Revision Date** - Identify the date on which the quality inspection checklist associated with the category was last revised.
- i. Left-click the drop down arrow  in the **Revision Date** field.
- ii. The date widget will appear.
- iii. Left-click the date that corresponds to the date from which the statistics should begin being compiled.
- iv. Left-click the **OK** button in the lower right-hand corner of the date widget.
- d. **Revision Number** - Identify the number of the revision.
- e. **Valid For** - Identify the period of time for which the inspection checklist is valid.

**NOTE:** The default value in the **Valid For** field is "1" and the default value for the unit of measure associate with the **Valid For** field is "Years".

- i. **Valid For** - Left-click the cursor into the field directly to the right of the Lead Time label and enter the number that corresponds to the lead time unit of measure. The spinner arrows  may also be used to adjust the number in whole number increments.
- ii. **Valid For unit of measure** - Left-click the drop-down arrow  in the field to the right of the lead time field and select the appropriate unit of measure type from the drop down menu.
- f. **Valid Until**- The date on which the quality inspection checklist will no longer be valid or should be reviewed.

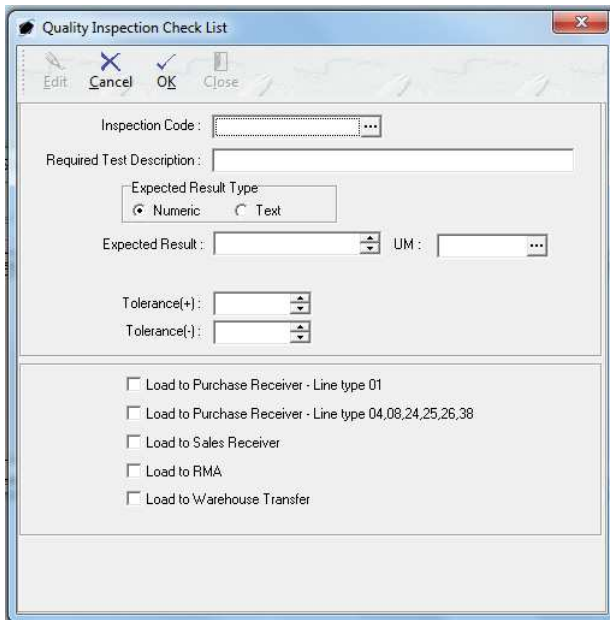
3. Left-click the **OK** button in the **Quality Inspection By Part Number** window toolbar to save the record and enable the buttons within the **Inspection List** grid.
  4. **Inspection List** grid - Adding, modifying, and deleting inspections to the quality inspection checklists will be discussed later in the procedure as it applies to all checklist types (system default, part number category, part number)
- iv. Modifying a Part Number
1. Left-click the line within the grid on the **Quality Inspection Check List By Part Number** window that corresponds to the part number for which the quality inspection checklist should be modified.
  2. Left-click the **Edit** button in the **Quality Inspection Check List By Part Number** window toolbar. The **Quality Inspection By Part Number** window will appear.
  3. After the appropriate modifications are completed, left-click the **OK** button on the **Quality Inspection By Part Number** window toolbar to save the modifications to the record.
- v. Deleting a Category
1. Left-click the line within the grid on the **Quality Inspection Check List By Part Number** window that corresponds to the category for which the quality inspection checklist should be deleted.
  2. Left-click the **Delete** button in the **Quality Inspection Check List By Part Number** window toolbar. A **Confirm** dialog box will appear to confirm that the category should be deleted.
  3. Left-click the **Yes** button to confirm the deletion.

d. **Quality Inspection Checklist Lines**

Regardless of the type of quality inspection checklist (system default, part number category, or part number), the process is identical for managing the individual lines that appear on the checklists. However, the interface is slightly different for the system default quality inspection checklist.


i. Adding a line onto the inspection checklist:

1. In the system default checklist, left-click the **Add** button on the **Quality Inspection Check List System Default** window toolbar; for category and part number checklists, left-click the **Add** button in the **Inspection List** grid.
2. The **Quality Inspection Check List** window will appear.



3. **Inspection Code** - Identify the type of inspection from a list of inspection types determined by your organization.





**NOTE:** To complete the **Inspection Code** field, the appropriate code must be listed in the **Quality Inspection Type List**. To access this table, left-click **Administration** from the toolbar, go to **Document Tables List by Code**, go to **CAR - Quality Inspection Setup** and left-click **Quality Inspection Type**.

- a. Left-click the ellipses  in the **Inspection Code** field.
- b. The **Quality Inspection Type List** search window will appear.
- c. Select the appropriate code (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
4. **Required Test Description** - Enter the description of the inspection. [60-character limit]




5. **Expected Result Type** group box - identify whether the inspection will provide a measurable, numeric result or a result that must be described in words.
- a. **Numeric** - left-click the radio button to the left of the **Numeric** label if the inspection results can be expressed in a measurable, numeric manner.

If the **Numeric** radio button is selected, complete the following fields:

- i. **Expected Result** - Left-click the cursor into the field and enter the number that corresponds to the expected result's unit of measure. The spinner arrows  may also be used to adjust the number in whole number increments.
- i. **UM** - Left-click the drop-down arrow  and select the appropriate unit of measure type from the drop down menu.
- ii. **Tolerance (+)** - Left-click the cursor into the field and enter the maximum acceptable variance greater than the expected result in terms of the expected result's unit of measure. The spinner arrows  may also be used to adjust the number in whole number increments.
- iii. **Tolerance (-)** - Left-click the cursor into the field and enter the maximum acceptable variance less than the expected result in terms of the expected result's unit of measure. The spinner arrows  may also be used to adjust the number in whole number increments.

- b. **Text** - left-click the radio button to the left of the **Text** label if the inspection results must be expressed in words.

If the **Text** radio button is selected, the available fields within the **Quality Inspection Check List** window will be modified. Complete the **Expected Result** field.



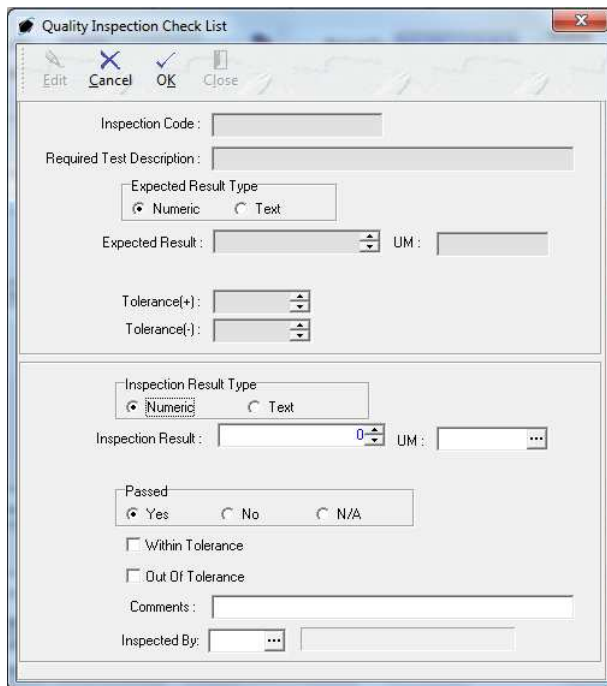
6. **Transactions** group box - identify the transaction(s) for which the quality inspection checklist line should appear.
- a. **Load to Purchase Receiver - Line Type 01** check box - Mark the check box as "checked" if the line should appear on the quality inspection checklist for receipts of inventory items on purchase receipts.
- b. **Load to Purchase Receiver - Line Type 04, 08, 24, 25, 26, 38** check box - Mark the check box as "checked" if the line should appear on the quality inspection checklist for the receipt of items that were identified on a purchase order by line types 04, 08, 24, 25, 26, or 38.

- c. **Load to Sales Receiver** check box - Mark the check box as "checked" if the line should appear on the quality inspection checklist for items received on sales receipts.
  - d. **Load to RMA** check box - Mark the check box as "checked" if the line should appear on the quality inspection checklist for items received on RMA receipts.
  - e. **Load to Warehouse Transfer** check box - Mark the check box as "checked" if the line should appear on the quality inspection checklist for items received during a warehouse transfer.
7. Left-click the **OK** button in the **Quality Inspection Check List** window toolbar.
  8. Left-click the **Close** button in the **Quality Inspection Check List** window toolbar.
- ii. Modifying an existing inspection checklist line:
1. Left-click the inspection checklist line that requires modification.
  2. In the system default checklist, left-click the **Edit** button on the **Quality Inspection Check List System Default** window toolbar; for category and part number checklists, left-click the **Edit** button in the **Inspection List** grid.
  3. The **Quality Inspection Check List** window will appear.
  4. After the appropriate modifications are completed, left-click the **OK** button on the **Quality Inspection Check List** window toolbar to save the modifications to the record.
  5. Left-click the **Close** button in the **Quality Inspection Check List** window toolbar.
- iii. Deleting an existing inspection checklist line:
1. Left-click the inspection checklist line that needs to be deleted.
  2. In the system default checklist, left-click the **Delete** button on the **Quality Inspection Check List System Default** window toolbar; for category and part number checklists, left-click the **Delete** button in the **Inspection List** grid.
  3. A **Confirm** window will appear to verify that the line should be deleted. Left-click the **OK** button on the **Confirm** window.

## 8. Completing Quality Inspection Checklists

Quality inspection checklists will be attached to receiving documents based upon the administrative setup. For purchase receivers, sales receivers, and RMAs, the **Quality Inspection Checklist** tab will appear in the receiving window and the steps below may be completed at any time. For warehouse transfers, a **Quality Inspection List** button will appear at the bottom of the Warehouse Transfer window; however, the button will not be enabled until the warehouse transfer document has a status of "Received".

- a. Double-click the quality inspection line.
- b. The **Quality Inspection Check List** window will appear.





**NOTE:** The upper portion of the window will display the inspection criteria that were identified in the administrative setup for this quality inspection line. All fields in the upper portion of the window will be inactive.

- c. **Expected Result Type** group box - identify whether the inspection provided a measurable, numeric result or a result that must be described in words.

**NOTE:** The **Expected Type** group box value will default to the value in the upper portion of the **Quality Inspection Check List** window; however, the inspection result may be recorded as numeric or text in the lower portion regardless of the value in the upper portion.


- i. **Numeric** - left-click the radio button to the left of the **Numeric** label if the inspection results are expressed in a measurable, numeric manner.

If the **Numeric** radio button is selected, complete the following fields:

1. **Inspection Result** - Left-click the cursor into the field and enter the number that corresponds to the inspection result's unit of measure. The spinner arrows  may also be used to adjust the number in whole number increments.
  2. **UM** - Left-click the drop-down arrow  and select the appropriate unit of measure type from the drop down menu.
- ii. **Text** - left-click the radio button to the left of the **Text** label if the inspection results must be expressed in words.  
  
If the **Text** radio button is selected, complete the **Inspection Result** field.
- d. **Passed** group box - Identify whether the inspection passed
    - i. **Yes** - left-click the radio button to the left of the **Yes** label if the inspection results meet the criteria of the quality inspection line.
    - ii. **No** - left-click the radio button to the left of the **No** label if the inspection results do not meet the criteria of the quality inspection line.
    - iii. **N/A** - left-click the radio button to the left of the **N/A** label if the inspection results are not relevant for the item being received.
  - e. **Within Tolerance** check box - Mark the check box as "checked" if the inspection results were within the tolerance limits set up in the upper portion of the **Quality Inspection Check List** window.  
  
NOTE: If the **Within Tolerance** check box is marked as "checked", the **Out of Tolerance** check box will not be allowed to be checked.
  - f. **Out Of Tolerance** check box - Mark the check box as "checked" if the inspection results were not within the tolerance limits set up in the upper portion of the **Quality Inspection Check List** window.  
  

**NOTE:** Only one of the two check boxes (*Within Tolerance* and *Out Of Tolerance*) may be checked at once.
  - g. **Comments** - Enter any relevant notes regarding the inspection as instructed by your organization.
  - h. **Inspected By:** - Identify the user that performed the quality inspection.  
  

**NOTE:** To complete the **Inspected By** field, the appropriate user must be listed in the **Users List**. To access this table, left-click **Administration** from the tool bar, go to **Pentagon Users and Groups**, and left-click **User List**.

Steps for creating a user may be found in the procedure "Creating a User" within the System Administration section of this manual.
  - i. Left-click the ellipses  in the **Inspected By** field.
  - ii. The **Users List** window will appear.

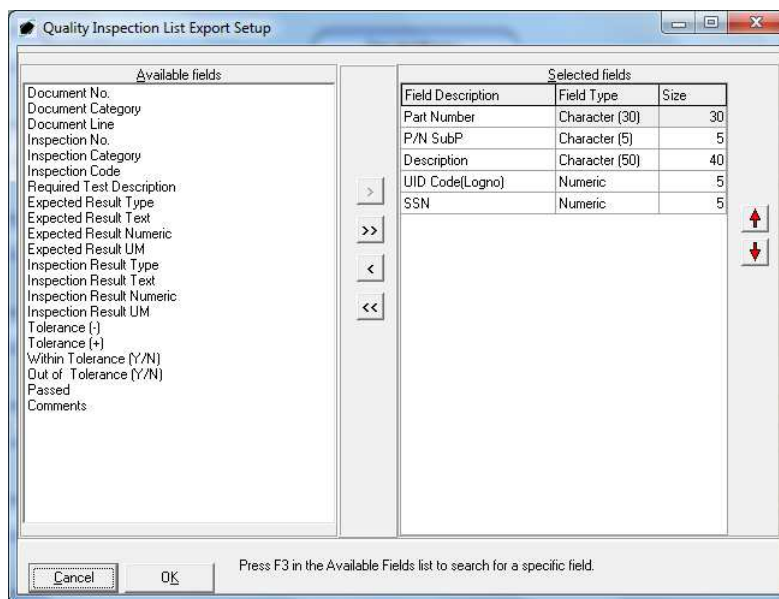
- iii. Select the appropriate user (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).




## 9. Data Export




It is possible to export a .csv file containing quality inspection information regarding all receipts of a particular part number or all receipts associated with a particular sales pick ticket. This functionality requires setup of the export in the administration menu, then execution of the export within the part master record warehouse or the pick ticket.

### a. Export File Setup

- i. Left-click **Administration** from the tool bar, go to **Document Tables List By Code**, go to **CAR - Quality Inspection Setup**, go to **Inspection List Defaults - All Defaults**, left-click **Quality Inspection List Export Setup**. The **Quality Inspection List Export Setup** window will appear.



- ii. To add a single field to the export:
  1. Left-click the field on the left-hand side of the **Quality Inspection List Export Setup** window (**Available Fields**) that should be added to the export.
  2. Left-click the right facing arrow  and the selected field will be moved to the right-hand side of the **Quality Inspection List Export Setup** window (**Selected Fields**).
- iii. To add all fields to the export, left-click the double right-facing arrow  and all available fields will be moved to the selected fields.
- iv. To remove a single field from the export:
  1. Left-click the field on the right-hand side of the **Quality Inspection List Export Setup** window (**Selected Fields**) that should be removed from the export.
  2. Left-click the left facing arrow  and the selected field will be removed from the right-hand side of the **Quality Inspection List Export Setup** window (**Selected Fields**).

- v. To remove all fields from the export (except the five mandatory fields), left-click the double left-facing arrow  and all fields will be removed to the selected fields.
- vi. To reorder the selected fields:
  - 1. Left-click the field on the right-hand side of the **Quality Inspection List Export Setup** window (**Selected Fields**) that needs to be in a different position within the export.
  - 2. Left-click the red up facing arrow  to move the field up in the list (this will move the field to the left within the .csv export).
  - 3. Left-click the red down facing arrow  to move the field down in the list (this will move the field to the right within the .csv export).
- vii. Left-click the OK button at the bottom of the **Quality Inspection List Export Setup** window.

b. **Export for a Part Number**

- i. From the part master record for which the export should be created, left-click the **W/H** button from the **Partnumber** window toolbar.



- ii. The **Locations** window will appear.
- iii. Left-click the **Options** button on the **Locations** window toolbar.



- iv. Left-click **24. Quality Inspection Checklist Export**.

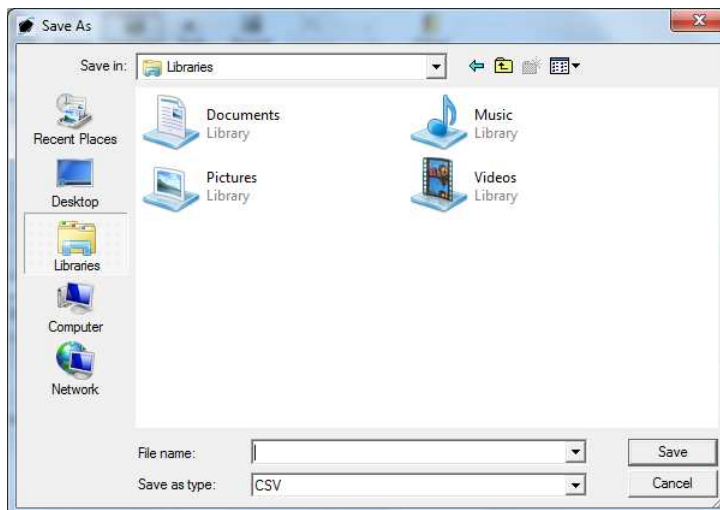
1. If records do not exist for that part number, an Information dialog box will appear indicating that there are no quality inspections to export.



2. If records do exist, the **Export to CSV File** will appear.



3. Left-click the ellipses **...** in the **File Name** field. The Save As window will appear.



4. Navigate to the file location in which the .csv file should be saved.
5. Left-click the cursor into the **File name** field and type the filename that the .csv file should be saved as.



6. Left-click the **Save** button on the **Save As** window.
7. Left-click the **Export** button. The export file will be created, named as indicated, and placed within the file location as indicated.

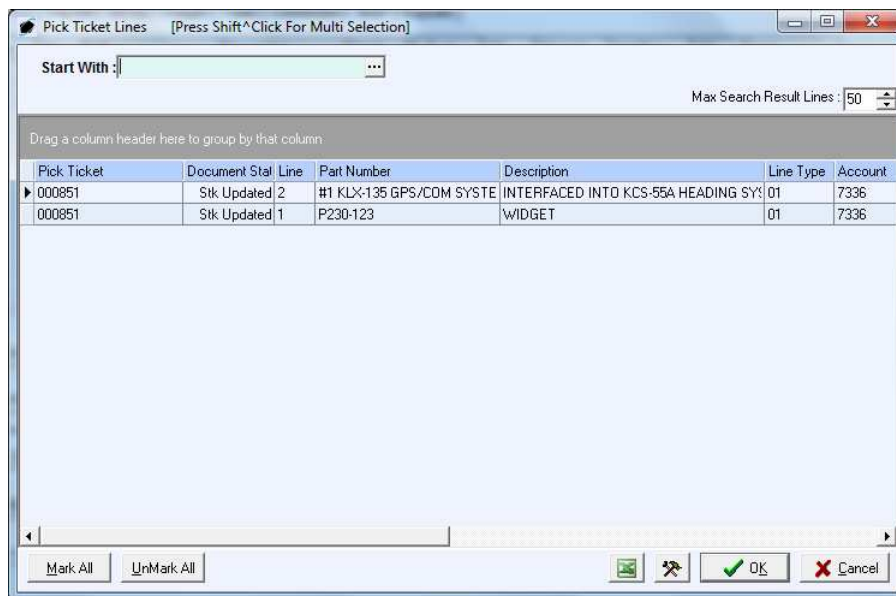
c. **Export for a Pick Ticket**

This export will include quality inspections linked to all (or selected) items picked from the warehouse. The quality inspections in the export are applicable to inspections conducted when the items were received into the warehouse (no quality inspection checklist is performed when items are picked from the warehouse on sales pick tickets)

- i. From the pick ticket for which the export should be created, left-click the **Optn** button on the **Locations** window toolbar.



- ii. Left-click **U. Quality Inspection Checklist Export**.
- iii. The **Pick Ticket Lines** search window will appear.



- iv. Left-click the line(s) for which quality inspections should be exported.

**NOTE:** The **Mark All** and **UnMark All** buttons may be used to select and deselect all lines quickly.

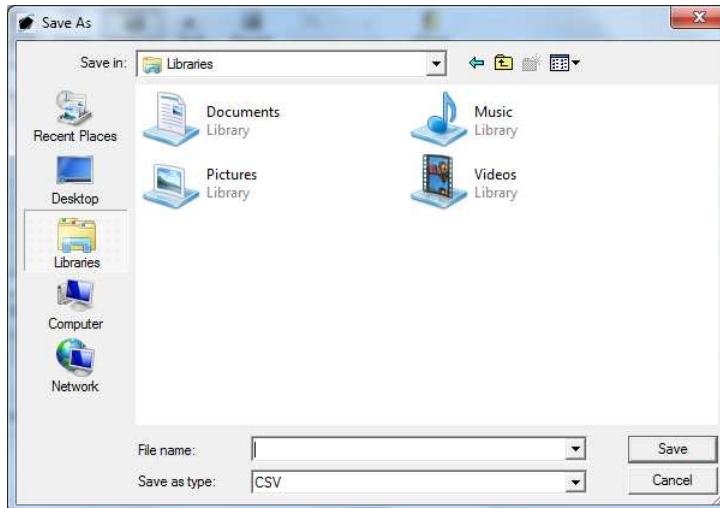
- v. Left-click the **OK** button in the **Pick Ticket Lines** window.
  1. If records do not exist for the items, an Information dialog box will appear indicating that there are no quality inspections to export.



2. If records do exist, the **Export to CSV File** will appear.



3. Left-click the ellipses **...** in the **File Name** field. The Save As window will appear.



4. Navigate to the file location in which the .csv file should be saved.
5. Left-click the cursor into the **File name** field and type the filename that the .csv file should be saved as.
6. Left-click the **Save** button on the **Save As** window.
7. Left-click the **Export** button. The export file will be created, named as indicated, and placed within the file location as indicated.