

Quality Control Enhancements

User Guide

Neon Version

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TO DO

- 1. Technical Requirements

About Proccession



Proccession is a Sage X3 suite of modules, which was created by **Proccession Software LLC**. Designed for process manufacturers and distributors, **Proccession** provides premium features and modules for your Sage X3 system.

Proccession allows companies to get more out of Sage X3.

Proccession picks up where Sage X3 leaves off. **Proccession** provides enhanced functionality for customers who are looking to get more from their Sage X3 system. **Proccession** helps to manage the complexity of process manufacturing allowing you to do more with less.

Proccession is a fully integrated solution that runs seamlessly within X3 and does not require additional hardware. Since **Proccession** is part of your Sage X3 system, it is easier to install and maintain than external third party applications. Since it shares the Sage X3 user interface, it is quick to learn and adopt. **Proccession** becomes part of your Sage X3 system and therefore requires no integration links and all data resides within the Sage X3 database.

About Proccession Software LLC.

Proccession Software LLC is a team of professionals from the worlds of process manufacturing and software development and implementation. Our vision is to create THE process manufacturing solution for Sage X3. This vision guided our development of **Proccession**.

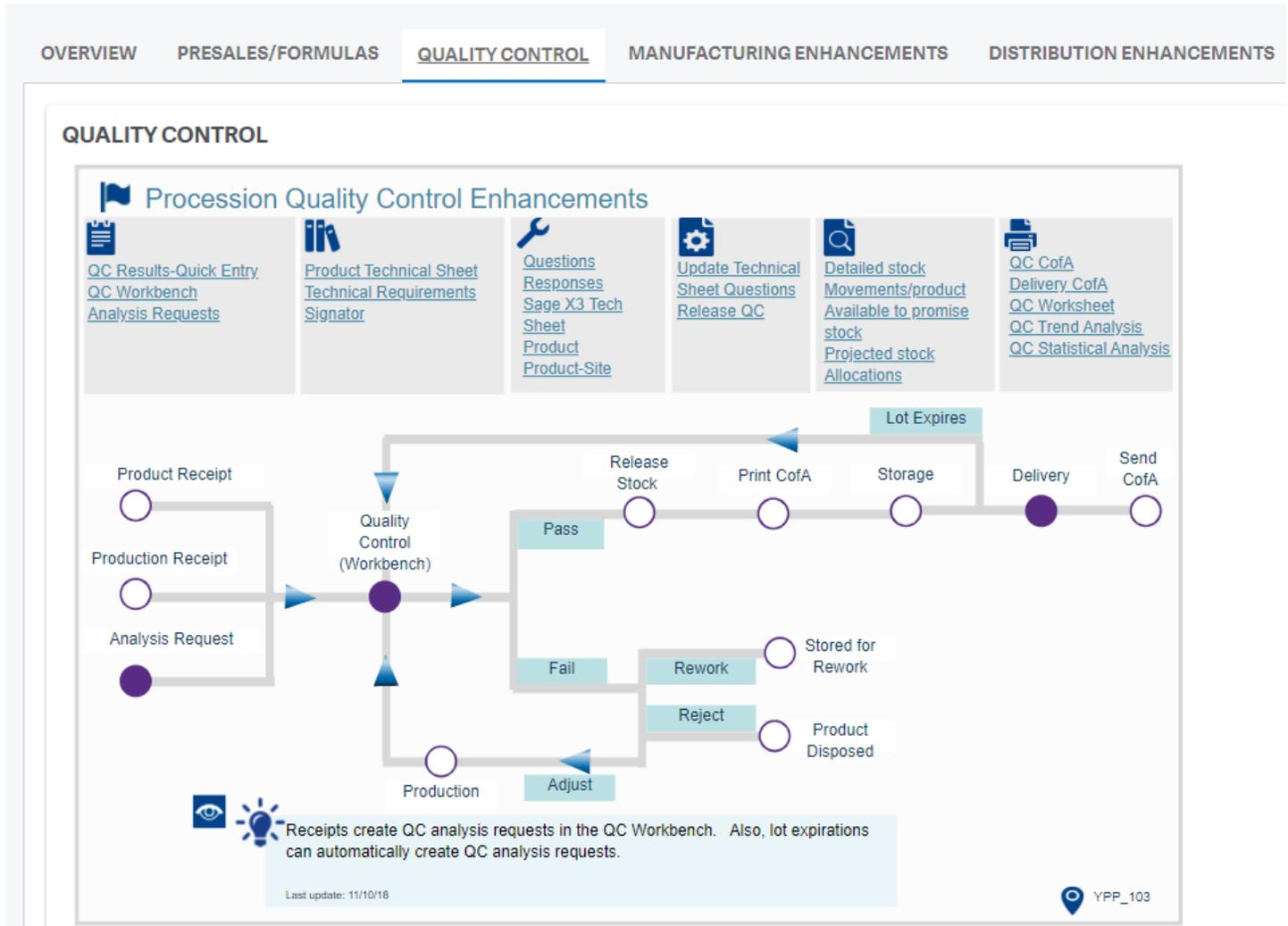
The initial seeds of **Proccession** started in 2006 when a team of process manufacturing professionals and developers designed and built software that would handle the unique requirements for chemical manufacturers. The software brought order to the chaos of regulation compliance, formula management, material safety data sheets and quality control.

The solution, which started in 2006, has evolved into **Proccession**, an enhancement suite for process manufacturers. Since its launch in 2014, **Proccession** has received much praise from the Sage X3 community. Today, companies ranging from hundreds of employees to companies with tens of employees use **Proccession**. As our user base continues to grow, our team is dedicated to adding innovative functionality that addresses the ever-changing landscape of regulations and the needs of formulators, quality control professionals, manufacturers and distributors.

Since 2013, the Proccession team has been working closely with Sage Software to ensure that our solution meets the development standards of Sage. **Proccession** has been a Sage Certified Solution since 2015.

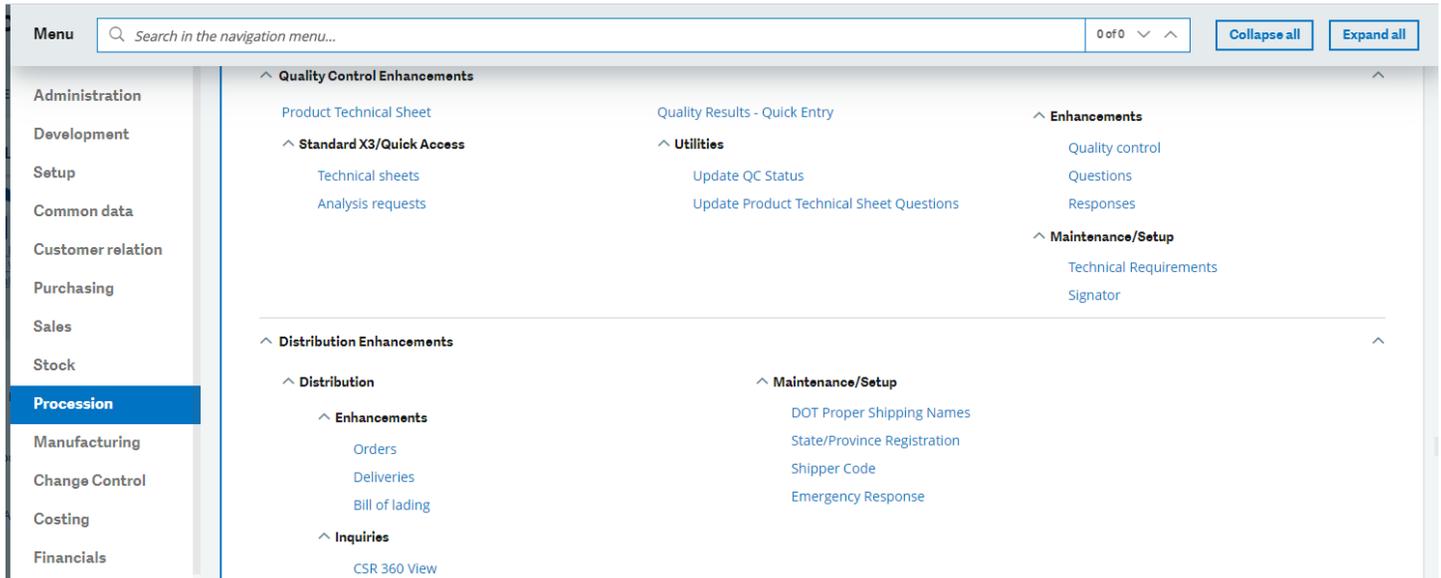
Visual Process Flows

Procession



Procession can be accessed from the Sage X3 Navigation Menu or from Visual Process Flows within the Sage X3 Dashboard. The Visual Process Flow shown above is installed with **Procession**. Customers can also create their own process maps in order to access both Sage X3 and Procession features.

The image below shows the **Procession** menu as seen in Sage X3 Version 12.



Quality Control Enhancements Overview

Sage X3 contains native Quality Control functionality that provides many features for managing the QC process.

Procession extends the Quality Control in Sage X3 and it adds several premium features that are commonly required by process manufacturers.

The following is a list of standard Sage X3 Quality Control Functionality:

- Questions
- Response Tables
- Technical Sheets
- Automatic Quarantine Process
- QC Workbench
- QC test result history
- Ability to approve or reject lots
- Non-Conformance (i.e. CAPA)

The following is a list of **Procession** Quality Control Enhancements:

- QC Specifications by Product, Type, Business Partner, Ship To Address or Routing Operation.
- Different types of QC Specifications such as in-process, final, pre-ship, etc.
- QC Quick Entry – Allows the entry of QC results prior to the product receipt.
- Support for multiple samples per batch.
- Ability to define Non-Standard Responses in the Response/Control Table.
- Statistical Analysis of QC History Results.
- Trend Analysis of QC History Results.
- Ability to easily print Certificate of Analysis for all product and/or lots on a shipment.
- Verification and warning if lots on a delivery do not meet the customer's specifications.
- Technical Requirement management per Formula, Product or Order.
- Tracking of CoA, Certificate and other document distribution (**New in Neon**).
- Ability to copy results from one sample to another.
- Test Methods per QC Test Question.
- Periodic QC Tests (**New in Neon**).
- Linked Transactions feature provides visibility to the original documents from the Quality Control record.
- Ability to import QC result data from lab equipment using the **Procession** import template and the "Table setup/import" feature in Sage X3.

The sections that follow provide details on both the standard Sage X3 QC functionality and the **Procession** Quality Control Enhancements.

Setup

Before using the **Procession** Quality Control Enhancements module for the first time, please refer to the different topics in this Setup section. These topics describe the steps necessary to setup data for use in Quality Control.

Sage X3 Responses

The response table is a standard feature in Sage X3, but it has been enhanced by **Procession** in order to allow responses to be defined as standard (i.e. passing) or non-standard. Response tables provide the ability to define acceptable result sets for a QC question. Responses can be accessed from either the standard X3 menu or by navigating to **Procession → Quality Control Enhancements → Standard X3/Quick Access → Responses**

All > Procession > Quality Control Enhancements > Standard X3/Quick Access

Responses

Response table *
R04 Pass / Fail Type *
 Alphanumeric Numeric

	Code	Standard Response	Code description (ENG)	Code description (FRA)
1	PASS	<input checked="" type="checkbox"/>	Pass	Passe
2	FAIL	<input type="checkbox"/>	Fail	Echouer
3		<input type="checkbox"/>		

Responses can be either Alphanumeric or Numeric. **Procession** adds the column “Standard Response”. If a response in this table is not marked as “Standard”, then it indicates that it is a non-standard or non-passing value.

For more information on the Response feature, refer to the Sage X3 help documentation.

Sage X3 Questions

The term “Question” is used in Sage X3 to refer to either:

- QC tests that are performed during the QC process.
- Characteristics or Properties
- Specifications

Questions can be accessed from the standard Sage X3 menu or by navigating to **Procession → Quality Control Enhancements → Enhancements → Questions**.

Procession enhances the Sage X3 Questions feature by adding the ability to define the test methods that can be used for the question.

↕ ↑ ↓ ↴ Question

Question *	QC03	pH	Short description	pH
TYPE				
Response type	Numeric	Control type	Ranges	
DEFINITION				
Response table	→	Q	:	
Formula	→	Q	:	Start range
				1
Formula	→	Q	:	End date
				14
Nominal value	7			
ANSWER				
<input checked="" type="checkbox"/> Nonstandard response	Blocking type	Status block	New record	Default response
			Q	:
Unit	→	Q	:	Decimals
				2
Grouping	→	Q	:	
<input checked="" type="checkbox"/> Printing				

Some options on the question screen include:

- **Response Type** – Defines if the question is Alphanumeric, Numeric, Date, Boolean or Text File.
- **Control Type** – Defines if and how a question should be validated
Options are:
 - **Value List** – Indicates that a response table will be assigned to this question. Standard or acceptable values will be any value contained in the response table.

- **Ranges** – Indicates a range will be defined. Standard or acceptable values will be any value within the range.
 - **No Control** – Indicates that no validation will occur on the result.
- **Response Table** – If the Control Type is “Value List”, then a response table must be assigned.
 - **Formula** – If the Control type is “Range”, this feature gives the option to create advanced logic for defining the range. This logic is built using the Sage X3 4GL programming language. Note, this feature is not compatible with *Procession*.
 - **Start Range/End Date** – This is another option for defining the range that does not require using Sage X3 4GL. For example, these fields can be used to define a PH range of 0-14.
 - **Nominal Value** – Target value for the question.
 - **Non-Standard Response** – If selected, then non-standard responses will be allowed for the question. If not selected, then non-standard responses cannot be entered unless the Control Type is “No Control”.
 - **Blocking Type** – If Non-Standard Responses are allowed, this defines what will occur when a non-standard response is entered. The options are:
 - No Block – Non-standard responses will be considered to be a passing result.
 - Status Block – Non-standard responses will be considered to be a failing result.
 - Next Sheet – When a non-standard response is entered, additional questions will need to be answered before a passing or failing status can be determined.
 - **New Record** – If the blocking type is “Next Sheet”, this defines an additional standard Sage X3 technical sheet that must be completed in order to determine a passing or failing status for this question.
 - **Default Response** – The default answer for the question.
 - **Unit** – Unit of measure for the question result.
 - **Decimals** – Defines the number places to the right of the decimal which are allowed for numeric results.
 - **Grouping** – Reference only field that can be used to define question groups.
 - **Printing** – Defines the default for whether this question should print on the Certificate of Analysis.

For more information on the Response feature, refer to the Sage X3 help documentation.

Procession Questions – Test Methods

Test methods are used to define the methods that can be used for determining a result for a QC Question. These test methods may include different types of lab equipment or procedures with varying degrees of cost and accuracy.

The test methods that are defined for a question are available for selection on the Product Technical Sheet and the QC Results within the QC Workbench. The test method entered on the QC Results will print on the Certificate of Analysis along with the specifications and results.

The Test methods menu option can be selected from the *Procession* menu on the right menu panel.

Test Methods

	Default	Method	Description
1	<input type="checkbox"/>	PHHELEC	pH Hydrogen Electrode
2	<input checked="" type="checkbox"/>	PHINDICAT	pH Indicator
3	<input type="checkbox"/>		

The fields on the Test Methods window are:

- **Default** – Select which test method will be the default when selecting the question onto a product technical sheet.
- **Method** – Select from a pre-defined test method, or add new test methods. To add a new test method, click on the action menu in the Method column and select jump to, which will take you to [Misc Table 4848 – QC Test Methods](#). Additional test methods can be entered into this miscellaneous table. Once the test methods are defined in the miscellaneous table, these test methods can be selected on the question.

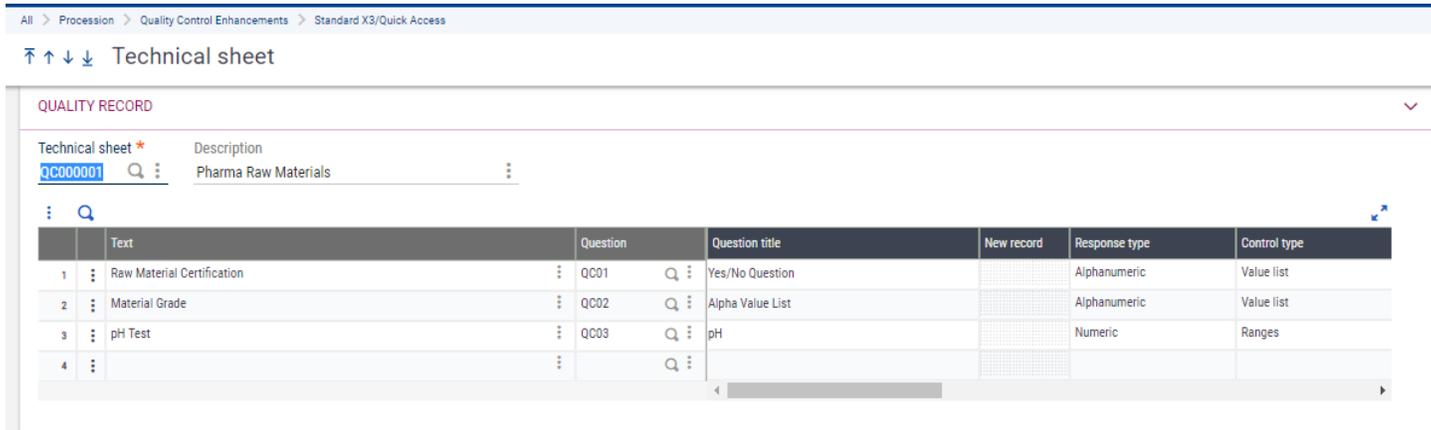
Sage X3 Technical Sheets

A Technical Sheet is a specification that includes a list of tests or questions for product or a group of product. In the Sage X3 + ProceSSION system, there are two types of Technical Sheets.

1. Sage X3 Technical Sheet
2. **ProceSSION** Product Technical Sheet

ProceSSION Product Technical Sheets provide greater functionality than the Sage X3 Technical Sheet. However, there are scenarios where the Sage X3 Technical Sheet will be used, as described below.

The Sage X3 Technical Sheets feature can be accessed from the standard Sage X3 menu or by navigating to **ProceSSION → Quality Control Enhancements → Standard X3/Quick Access → Technical Sheets**.



The Sage X3 Technical Sheet provides the ability to create multiple technical sheets and to add multiple questions to each. Sage X3 also gives the ability to assign a standard technical sheet to either:

- Product Supplier
- Product Site

The standard Sage X3 Technical Sheet does not allow ranges or response tables to be changed on the technical sheet. Also, it does not allow the ability to define customer specifications for a product. When this functionality is required, the [Procession Product Technical Sheet](#) should be used instead of the Sage X3 Technical Sheet.

For these reasons, we recommend that the Sage X3 technical sheet only be used for the following two purposes:

- Raw Material Groups – If a large group of raw materials all require the same QC tests and the same result ranges, then it may be more efficient to create a single standard Sage X3 technical sheet and assign to those raw materials.
- Templates – **Procession** allows the standard Sage X3 technical sheets to be used as templates when creating **Procession** Product Technical Sheets. To do this, define the most commonly used groups of questions that would normally be used together for different types of products. Create a standard Sage X3 technical sheet for each of these groupings. The Sage X3 technical sheet can then be selected when creating a **Procession** technical sheet.
- Levels 2 and Up - If a QC Question has multiple levels, then the level 2 and greater will be defined using a Sage X3 Technical Sheet. For example, a Level 1 question can be added to a **Procession** Product Technical Sheet, but if that question has a “New Record” (i.e. Level 2 Questions) defined for it, then the New Record will be a Sage X3 Technical Sheet. In this example, the Procession Product Technical Sheet and the Sage X3 Technical

For more information on the standard Sage X3 Technical Sheet feature, refer to the Sage X3 help documentation.

Sage X3 Stock Statuses

In standard Sage X3, the quality of stock can be tracked using stock statuses. These stock statuses can be setup by navigating to **Common Data → Product Tables → Stock Statuses**.

There are three major categories for the stock statuses; however subcategories can be defined under each category. The major categories are:

- “A” – acceptable quality
- “Q” – stock is in quality control
- “R” – rejected or nonacceptable quality.

Subcategories can be used to define different levels of the main categories. The subcategories are two characters in length, with the first character being the major category. For example, a status of “RW” could represent rework and a status of “RJ” could represent product that will be destroyed.

For more information on the standard Sage X3 Stock Statuses feature, refer to the Sage X3 help documentation.

Sage X3 Stock Management Rules

All > Setup > Stock

Stock management rules

RECEIPTS ISSUES

RECEIPTS

11 Results Display: 50

	Movement type	Location	Authorized statuses	Authorized substatuses	Default st...	Description	Analys...	Lot entry	Default batch
1	Miscellaneous receipt	Receipt	'A'+ 'Q'+ 'R'	A*,Q*,R*	A Q	Accepted	No	Free	None
2	Supplier receipt	Receipt	'A'+ 'Q'+ 'R'	A*,Q*,R*	A Q	Accepted	Yes	Free	Supplier lot
3	Subcontract receipt	Receipt	'A'+ 'Q'+ 'R'	A*,Q*,R*	A Q	Accepted	Yes	Free	Supplier lot
4	Work order receipt	Workstation	'A'+ 'Q'+ 'R'	A*,Q*,R*	A Q	Accepted	Yes	Free	None
5	Quality control	Stock	'A'+ 'R'	A*,R*	A Q	Accepted	No		
6	Shipment return	Receipt	'A'+ 'Q'+ 'R'	A*,Q*,R*	Q Q	Quarantined	No	No	None
7	Loan return	Receipt	'A'+ 'Q'+ 'R'	A*,Q*,R*	A Q	Accepted	No	No	None
8	Subcontract delivery return	Receipt	'A'+ 'Q'+ 'R'	A*,Q*,R*	Q Q	Quarantined	No	No	None
9	Stock return	Workstation	'A'+ 'Q'+ 'R'	A*,Q*,R*	A Q	Accepted	No	No	None
10	Stock change	Stock	'A'+ 'R'	A*,R*			No	Free	None
11	Internal transfer receipt	Receipt	'A'+ 'Q'+ 'R'	A*,Q*,R*	A Q	Accepted	No	Free	None
12					Q				

Sage X3 Stock Management Rules are used to setup the default QC behavior for all products. On the management rules, the default statuses are setup for each transaction type. This feature can be accessed from the menu **Setup→Stock→Stock Management Rules**.

For receipt transactions, the following two fields, along with the QC Management value on the Product-Site Management tab or Product Supplier tab, determine whether a product will be automatically quarantined. When a product is quarantined for testing, these two fields help to determine whether a QC Analysis Request is created. QC

Analysis Requests are shown in the Sage X3 feature called “Quality Control” (i.e. the QC Workbench) and QC results are entered for the Analysis Request. Results must be entered or imported for these records in the QC Workbench before a product can be released from quarantine.

- **Default Status** - Set value to “Q”, if the default behavior for this transaction type is to quarantine the product.
- **Analysis Request** – Set value to “Yes”, if a QC Analysis Request should be automatically created when the stock status for a receipt is “Q”.

The stock management rules can be overridden on the Product Category.

For more information on the standard Sage X3 Stock Management Rules feature, refer to the Sage X3 help documentation.

Sage X3 Product Category Setup

Product category

SAGE ▾



Category * SFMSL Storage site Semi Finished Lot

Description Management Units of measure Receipts Issue flow Accounts/costs Purchase/sales Planning Warehouses Properties

MANAGEMENT RULES

9 Results Display: 25

	Movement type	Mvt code	Location	Authorized status	Authorized substatus	Default status	Analysis request	Lot entry
1	Miscellaneous receipt			Status 'A'+Q'+R'	A*,Q*,R*	A	Yes	No
2	Supplier receipt			Status 'A'+Q'+R'	A*,Q*,R*	A	No	No
3	Work order receipt			Status 'A'+Q'+R'	A*,Q*,R*	A	Yes	No
4	Quality control			Status 'A'+R'	A*,R*	A	No	Free
5	Shipment return			Status 'A'+Q'+R'	A*,Q*,R*	Q	No	No
6	Loan return			Status 'A'+Q'+R'	A*,Q*,R*	A	No	Free
7	Stock return			Status 'A'+Q'+R'	A*,Q*,R*	A	No	No
8	Stock change			Status 'A'	A*		No	Free
9	Internal transfer receipt			Status 'A'+Q'+R'	A*,Q*,R*	A	No	Free
10								

On the Product Category Receipts tab is an option to override the Stock Management Rules, defined in the prior section. Receipt rules entered for a product category overrides the rules entered in the [Sage X3 Stock Management Rules](#) feature. Product Categories can be accessed from the menu **Common Data**→**Products**→**Product Categories**. Stock Management Rules for a Product Category are setup on the Receipts and Issues tabs of the Product Category Window.

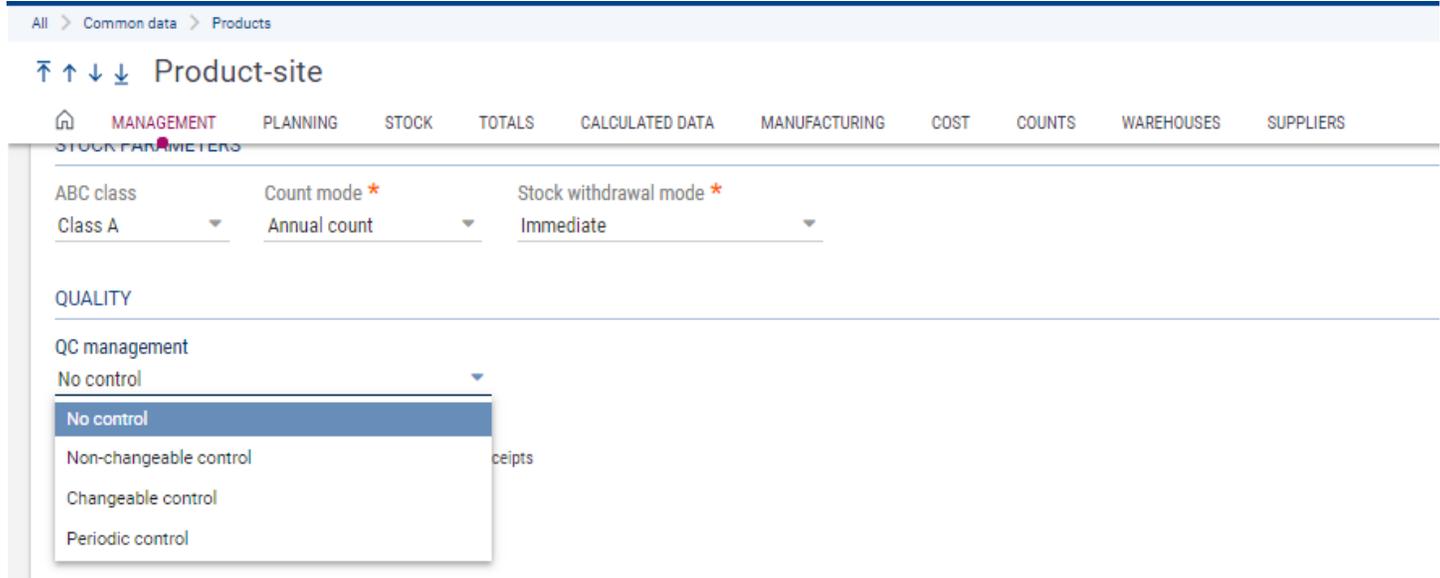
For receipt transactions, the following two fields, along with the QC Management value on the Product-Site Management tab or Product Supplier tab, determine whether a product will be automatically quarantined. When a product is quarantined for testing, these two fields control whether a QC Analysis Request is created. QC Analysis Requests are where QC results are entered before a product can be released from quarantine.

- **Default Status** - Set value to “Q”, if the default behavior for this transaction type is to quarantine the product.

- Analysis Request – Set value to “Yes”, if a QC Analysis Request should be automatically created when the stock status is “Q”.

For more information on the standard Sage X3 Product Category Setup, refer to the Sage X3 help documentation.

Sage X3 Product-Site Setup



Additional standard QC controls can be found on the Sage Product-Site Management tab. These QC controls work with the Stock Management Rules and in some cases can override the values set on the Stock Management Rules. The Product-Site feature can be accessed from the **Common Data**→**Products**→**Product-Site** menu option.

On the Product-Site Management tab are the following QC Management options:

- **No Control** – (Default) the controls is based upon the stock management rules for the transaction type.
- **Non-changeable control** – Receipts for this product will automatically receive a stock status of “Q”, regardless of the status assigned in the stock management rules. This value cannot be changed on the stock transaction.
- **Changeable control** – Receipts for this product will automatically receive a stock status defined in the stock management rules, but the stock status can be manually changed on the transaction.
- **Periodic Control** – Allows a testing frequency to be defined, based upon the number of receipts for the product. For instance, if the frequency is set to 10, then when the 10th receipt is created, the status for the receipt will default to “Q” on the transaction record. The periodic control is based upon the number of transactions, not the quantity on each transaction. Note, that there is a separate feature in **Procession** called Periodic Tests, discussed later in this document, which allows you to define tests that should be performed on a calendar schedule.

- In standard X3, if the QC Management is set to any value except “No-Control”, then the Technical Sheet field is enabled. The Technical Sheet field is a standard Sage X3 field and it should be left blank if the product will be assigned a **Procession** Product Technical Sheet. A value can be entered into this field if the standard Sage X3 Technical Sheet will be used for the product, instead of the **Procession** Product Technical Sheet.
- **Sampling/AQL** – AQL is a standard Sage X3 feature that is used to determine the Acceptable Quality Level for a product. AQL does not determine whether a receipt generates a “Q” status or whether a QC Analysis Request is created. Instead, AQL allows the entry of the number of passing and failing samples during the QC Results entry in the Quality Control workbench. The AQL feature is not used with Procession at this time.

Sampling

Sampling	General level
Single	II
AQL	Sampling mode
1.0	Lot

For more information on the standard Sage X3 Technical Sheet feature, refer to the Sage X3 help documentation.

Sage X3 Product Supplier Setup

The product supplier is a tab on the product window. This tab can contain QC settings for the product, which override the settings from both the Stock Management Rules and the Product-Site window.

QUALITY

QC management

No control

Frequency

0 0 Receipts

Technical sheet

Access code

Q :

SAMPLING

Sampling

None

General level

AQL

0.0

Sampling mode

No management

The QC Management field exists on both the Product-Site and the Product-Supplier records. If a product-supplier record exists, then the setting on the Product-Supplier overrides the setting on the Product-Site for receipts from the supplier for the specified product. Refer to [SAGE X3 PRODUCT-SITE SETUP](#) for more information on the QC Management field and the Technical Sheet field.

For more information on the fields in this section of the Product-Supplier window, refer to the Sage X3 help documentation.

Procession Product Technical Sheet

The **Procession** Product Technical Sheet is a QC enhancement that allows multiple technical sheets to be defined for a single product. The **Procession** Product Technical Sheet contains the test questions and specifications for the product. When testing the product in QC, the test results are entered and validated against the Product Technical Sheet.

The **Procession** Product Technical Sheet can be accessed by navigating to **Procession → Quality Control Enhancements → Product Technical Sheet**.

The following types of Product Technical Sheets are the main types that can be created in **Procession**:

1. **Production Specifications** –internal specifications for determining the quality of a product.
2. **Customer Specifications** – specifications that are specific to a customer
3. **Delivery Address Specifications** – specifications that are specific to a customer’s delivery address.
4. **In-Process Routing Operation Specifications** –specifications that are specific to a routing operation step.
5. **Types** – types of specifications, such as final, in-process, pre-ship, etc.

A single product can have multiple Product Technical Sheets based upon different combinations of the Type, Product, Customer, Delivery Address and Operation fields.

	Question	Question title	Question text	Test method	Co...	PO	Target Value	Start V
1	QC05	% Solids			<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	6
2	QC03	pH		PHHELEC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7	7
3	QC07	% Moisture			<input checked="" type="checkbox"/>	<input type="checkbox"/>	4	2
4	QC70	Density			<input checked="" type="checkbox"/>	<input type="checkbox"/>	1.14	1.05
5					<input type="checkbox"/>	<input type="checkbox"/>		

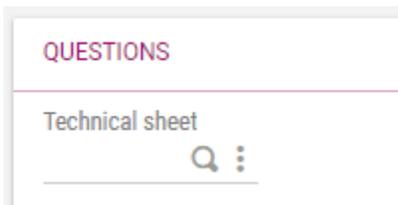
A **Procession** Product Technical Sheets is created for a product, so no additional steps are required to assign the Product Technical Sheet to the product. However, if a standard Sage X3 technical sheet has been assigned to a product-supplier

or the product-site record, then the Sage X3 technical sheet should be removed from the product record before using the **Procession** Product Technical Sheet for the product.

When creating a Product Technical Sheet, the type of technical sheet is determined by the information entered in the header section. The fields in this section are:

- **Technical Sheet ID** – A unique ID that is assigned to the Product Technical Sheet when it is created. This number is automatically generated by the system when creating a new Technical Sheet.
- **Product** – (Required field) Product ID for this Product Technical Sheet.
- **Customer** – (Optional) – If entering a customer specification, the customer is entered into this field.
- **Delivery Address** (Optional) – If customer specifications can vary by delivery address, then a separate Product Technical sheet can be created for each delivery address.
- **Type** – (Required field) – Defines the type of technical sheet. Typical examples would be either “FINAL” or “INPROCESS” test. For more information on types, refer to section [Local Menu 4852 – Product Technical Sheet Types](#) .
- **Operation** – If the type is not a “FINAL” type, then an operation number may be specified. This should be an operation number from the routing for the product. When an operation number is specified, it indicates that the Product Technical sheet will be used for in-process testing of the product for the specified operation step.

The Technical Sheet field in the Questions section can be used to pull in questions from a Sage X3 Technical Sheet. In other words, the Sage X3 Technical Sheet can be used as a template for creating a **Procession** Product Technical Sheet.



The image below shows the pop-up view of a Product Technical Sheet record. More detail on the fields in this section are provided below.

Question *	Question title	Question text	Test method	<input checked="" type="checkbox"/> CoFA	<input type="checkbox"/> PO	<input checked="" type="checkbox"/> Non-PO
→ QC05	% Solids					
Target Value	Start Value	End Value	Response type	Control type	Response table	
7	4	15	Numeric	Ranges		
Blocking type	UOM	Decimals	<input checked="" type="checkbox"/> Non-standard response	Months	Last Tested	<input type="checkbox"/> Allow Ignore
Status block	→	0		0.00	07/10/20	
Technical Sheet					Sequence	New record
					1000	

Product Technical Sheet Fields:

- **Question** – QC Question ID.
- **Question Title** – The description from the QC Question. This title will print on the Certificate of Analysis.
- **Question Text** – Any additional internal information about the QC Question. This information does not print on the Certificate of Analysis.
- **Test Method** – Specifies which test method should be used for the question. For more information on Test Methods see [Test Methods](#).
- **CofA** – Flag that determines if the question should display on the Certificate of Analysis. This value defaults from the “Printed” flag on the QC Question, but can be changed on the Product Technical Sheet.
- **PO** – This flag controls whether the question is available for Purchase Receipts.
- **Non-PO** – This flag is used to indicate whether the questions is available when entering results for non-PO receipts, such as Production Tracking, Customer Returns, etc.
- **Target Value** – The target result that is expected for this question. This value defaults from the nominal value that is defined for the question.
- **Start Value** – For questions that have ranges, this is the beginning value. This value defaults from the question, but can be edited on the Product Technical Sheet.
- **End Value** – For questions that have ranges, this is the ending value. This value defaults from the question, but can be edited on the Product Technical Sheet.
- **Response type** – Question type, such as Alphanumeric, Date, etc. The value defaults from the question and is non-editable.
- **Control Type** – Determines if the question is controlled by a range or value list. This field is non-editable.
- **Response Table** – If the Control Type is “Value List”, this determines which values are acceptable. By default, this field will contain the response table assigned on the Question master record. However, this value can be changed for the product.

For example, a question named “COLOR” may have different response tables depending on the product.

- **Blocking Type** – Determines what action should be taken if a question response is a non-standard or non-acceptable value. This field is editable.
- **UOM** – Unit of measure for the responses. The UOM prints on the CoA with the result.
- **Decimals** – Number of decimals allowed for numerical responses. This value controls how many decimals will show for the result on the CofA.
- **Non-standard Response** – Non-editable field that indicates whether non-standard responses are allowed for the question.
- **Months (New in Neon)** – For Periodic Tests that are performed based upon calendar intervals. If a non-zero value is entered for this field, then this test will only be required at the specified interval.

For example, if the test should only be performed on the product once per month, then a 1 would be entered in this field. When entering QC results, if the test was last performed less than one month ago, then the question would not show in the Quality Control Results when testing a lot for this product. However, if the test was last performed more than one month ago, then the test would display for entry when entering Quality Control Results.

- **Last Tested (New in Neon)** – Indicates the date that the test was last performed. This is used in conjunction with the “Months” field. This field is editable, which allows the start date to be specified or the last tested date to be reset if necessary.
- **Allow Ignore** – This option is used when either:
 - a) The question only requires responses periodically and results for this question are not required each time that QC results are entered for a product or
 - b) The results for the question will not be available at the time that the stock is released into “A” status. The results for this question will be determined afterwards and will be entered for the archived QC Workbench record.

The Allow Ignore option allows those tests to be ignored when entering QC results. However, if a response is entered, that response will be validated.

- **Sequence** – The order in which the questions should appear. This field is editable.
- **New Record** – If the test does not equal the target value or is not within the acceptable range, it is possible to set up additional questions. These additional questions allow users to perform further testing and to return a passing result. The new record is setup as a standard Sage X3 Technical sheet. This field is editable if the question is setup with a blocking type of “Next Sheet”.

Product Technical Sheet Report

The Product Technical Sheet report is a lab worksheet that allows the QC results and additions to be tracked in paper form. This is useful in situations where testing is occurring in an area where either a computer is not nearby or it is an area where it is not practical to have a computer.

A version of this report also prints automatically with the **Procession** Batch Ticket.

The Product Technical Sheet report can be printed from the **Procession** Product Technical Sheet screen. To print, *Click* the printer icon and select the report code XJB2QCTECH.

Enter report parameters



Report code:

Parameters

	Parameter title	Parameter type
1	Product Id	Single
2	Customer	Single
3		

LAB CONTROL SAMPLE FORM

Formula: FG500-BULK Description: Paint-Low VOC Acrylic Gloss Batch Number/WO #: _____
 Lot Number: _____ Customer: NA009 ABC Industrial Vessel #: _____

LAB

	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	Sample 6	Sample 7
Date							
Time							
Step							
Initial							

ANALYSIS

Description	Question #	Range	Target	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	Sample 6	Sample 7
% Solids	QC05	6 - 8	7							
pH	QC03	7 - 8	7							
% Moisture	QC07	2 - 6	4							
Density	QC70	1.05 - 1.2	1.14							

ADDITIONS

Addition #	Sample#	Question #	RM Code	Description	Amount to Add	UOM	Batch Size	Lot #	Comments	Added

CHECK LIST

	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	Sample 6	Sample 7
Lab Results in Spec							
Work Recorded in X3							
Finals Completed							
Results in Spec Book							
Retained, labeled, and Filed							

INSTRUCTIONS

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Entering Quality Control Results

In Proccession, the two methods for entering QC Results are:

- Quick Entry
- Quality Control

Each of these methods are described in detail in the following sections.

QC Results - Quick Entry

The QC Result -Quick Entry feature allows QC results for multiple samples of the same product to be entered in a tabular format.

Quick Entry is accessed from the menu **Proccession**→**Quality Control Enhancements**→**QC Results-Quick Entry**.

Benefits of the Quick Entry feature are:

- Faster data entry, since each question is a column and each sample is a row in the table.
- Results can be entered at any point in the receipt or manufacturing process. This includes the ability to enter QC results before a product has been received.
- Multiple samples can be tested and results recorded at the same time.
- QC results can be reviewed and approved before they are posted.
- One set of QC results entered in the Quick Entry can be automatically posted to multiple Quality Control Detail lines in a QC Workbench.
- Quick Entry records can be copied in order to post to multiple QC Workbench records.

All > Procession > Quality Control Enhancements

Procession - Quick Entry

Header Samples Question Defaults

Id: QC000025
 Product *: FG500-BULK
 Site *: N/A023
 Lot Number: LO1901NA0230001
 Technical Sheet ID *: TS00001
 Type: FINAL

Operation: 0
 Ope description:

Header

Status

Date created: 11/22/19
 Analysis request: QUANA0230214
 Posted

Documents

Project Number:
 Transaction type: Workorder
 Document no.: WONA0230120
 Document line number: 0

Samples

	R...	Sa...		% Solids	PH	% Moisture	Viscosity
1	P	11:30	1	5.5	7.2	3	7
2	P	11:30	2	5.4	7.1	2.3	7.1
3							

Quick Entry can be used for any type of Product Technical sheet, including INPROCESS or FINAL types. The fields on each section are described below.

Header Section

- **ID** – Unique identifier for the Quick Entry record. This ID is automatically assigned when the record is created.
- **Product** – the product for which the QC results are entered.
- **Site** – Site where the product was received or will be received.
- **Lot Number**- Lot number for the product. If the product exists in inventory, then the lot number can be selected. If the lot does not yet exist in inventory, then the lot number can be entered into the field. The lot number can also be left blank and entered later.
- **Technical Sheet Id** – Select the Product Technical Sheet ID. The selected ID determines which questions will show in the Quick Entry record.
- **Type** – The type of Product Technical Sheet selected. This value is populated from the selected Product Technical Sheet.
- **Operation** – If an in-process Product Technical Sheet is selected, this field will show the operation number for the routing step. This value is populated from the selected Product Technical Sheet.
- **Date Created** – Date the Quick Entry record was created.

- **Posted** – Indicates whether the Quick Entry results have been posted against a Quality Control Analysis Request. This field is automatically marked when Quick Entry results are posted. Quick Entry results are posted using the “Post QE Results” menu option on the Quality Control window.
- **Analysis Request** – If posted, this field is automatically populated with the Quality Control Analysis Request to which the Quick Entry results were posted.
- **Project Number** – CRM Project number.
- **Transaction Type** – Type of receipt transaction. The value entered here controls the type of documents which can be selected in the Document No. field.
- **Document No.** – Manually entered or selected field for the transaction document number. This value is optional, but when it is entered, it is used in the posting of the QE Results to a Quality Control record.
- **Document Line Number** – Line number for the transaction document. This value is optional and is informational. For example, this field can be used to specify which line of a PO receipt is being tested.

Samples Section

The sample section is where the results from multiple samples can be entered. The fields in this section are:

- **Result** – Indicates the overall status for the sample row. This value is automatically determined as results are entered.

The range of values are:

- **F** – One or more failing questions for the sample.
- **P** – All passing questions for the sample.
- **I** - Some questions are incomplete for the sample.

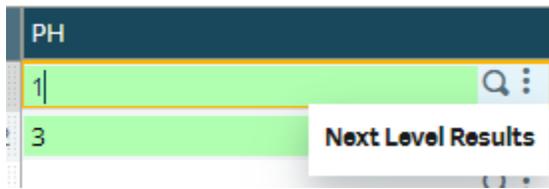
- **Sample Time** –As samples are entered, the system automatically records the time of the sample.
- **Questions** –Questions are dynamically displayed as columns, based upon the selected Product Technical Sheet. The background color of the column field indicates the status. The possible values are:

- **White** – Incomplete, no value has been entered.
- **Green** – Passing
- **Red** – Failing

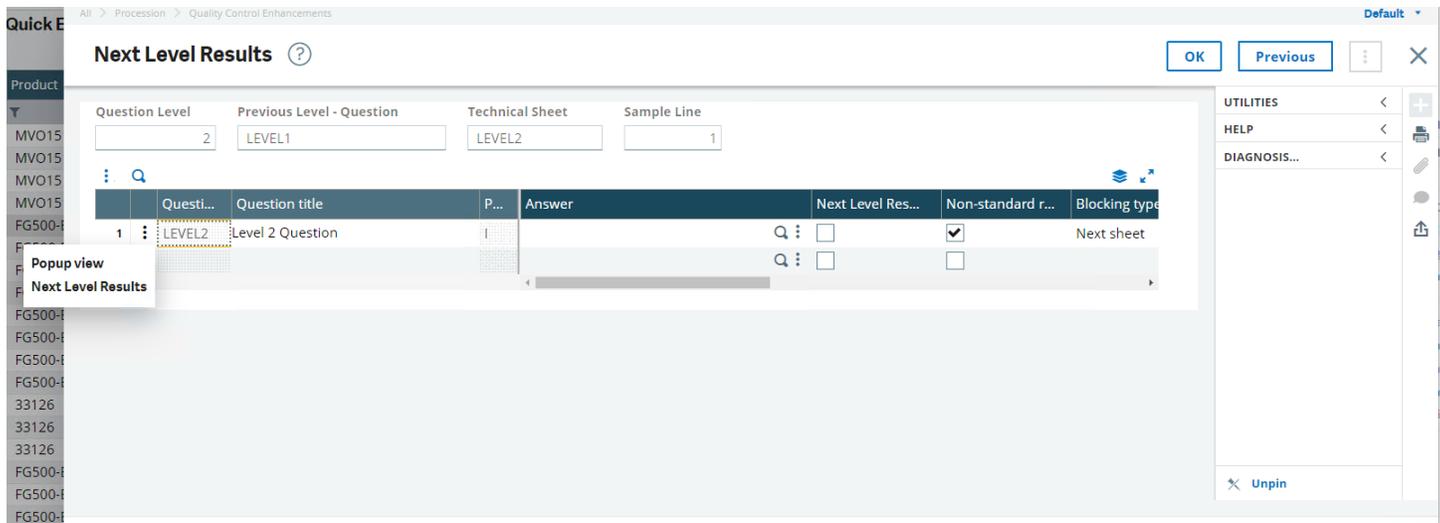
If a Question has a value list associated with it, the result can be selected from the list by clicking on the magnifying glass beside the field.

	% Solids	PH
1	12	4.2

Next Level Results (New Feature in Neon)



Next Level Results is an action menu option on each question column of the Quick Entry window. If a “New Record” was defined for the question, this option will display the next level questions. The next level questions will also automatically display if an invalid result is entered for a question which as a “New Record” defined.



On the Next Level Results window, if the current level question has a “New Record” assigned to it, it is possible to navigate to the next higher level. Proccession supports up to 5 levels of questions. The next level question will automatically display if an invalid answer is entered on the current level question. The next level question can also be accessed using the “Next Level Results” on the action menu for the row.

On the Next Level Results window, the following fields are shown in the header:

- **Question Level** – The current question level.
- **Previous Level** – Question – The question on the previous level.
- **Technical Sheet** – The Sage X3 Technical Sheet that defines the questions on the current level.
- **Sample Line** – The Quick Entry Sample Line which is currently being tested.

The fields in the Grid of the Next Level Results window are:

- **Question** – Test Question
- **Question title** – Titles

- **Pass/Fail** – This field contains a “P” if the results is passing. “I” indicates incomplete and “F” indicates a failing result.
- **Answer** – The result is entered in this field.
- **Next Level Results** – This checkbox indicates if there is a result for this question on the next higher level.
- **Non-Standard Response** – Indicates whether this question accepts non-standard results.
- **Blocking Type** – Indicates what event occurs if an invalid result is entered.
- **New Record** – If this field contains a value, then there is next level technical sheet for this question.
- **Control Type** – Determines what type of validation occurs on this field.
- **Response Type** – Determines the type of response.
- **Starting Value** – For range control types, this is the starting value of the range.
- **Ending Value** – Ending value for the range.
- **Control Table** – For “value” control types, this is the response table for this question.

To navigate to a previous question level, click the “Previous” button in the upper right of window. After entering all of the next level results, click the Ok button to exit the window.

If all Level 2 questions are passing, then the Level 1 question on the Quick Entry screen will show as passing, regardless of whether the Level 1 result was in spec. Similarly, results on each Level + 1 technical sheet can override a failing result on the current Level.

Question Default Section

The question default section contains the question details from the Product Technical Sheet, such as the acceptable ranges and question text. The fields in this section are:

- **Question** – Question id.
- **Question Title** – Description of the question.
- **Text** – Question text from the Product Technical Sheet.
- **Response Type** – Type of response, such as Numeric, Alphanumeric, etc.
- **Control Type** – Type of control, such as Ranges, Value List, etc.
- **Blocking Type** – Indicates if the question blocks or fails invalid responses.
- **Starting Value** –When using ranges, this is the starting value.
- **Ending Value** – When using ranges, this is the ending value.
- **Control Table** – If using Value Lists, this is the value list for the question.

Timeout Settings

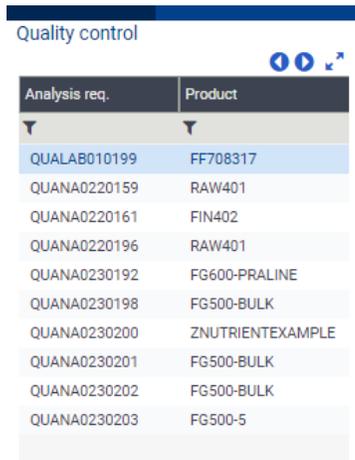
By default, Sage X3 will timeout sessions after 20 minutes of inactivity. When Sage X3 times out while the user is inactive on a data entry window, then any unsaved data is lost. Since the Quick Entry screen will be idle while waiting for the results of the next sample, it is recommended that the user save after each sample is entered. Also, it is recommended to increase the timeout settings in order to reduce the likelihood of losing data. For more information on increasing the timeout setting, see [Appendix 2 – User Session Timeout Settings](#).

Quality Control Workbench

The Quality Control Workbench (QC Workbench or “Quality Control”) is a standard feature in Sage X3 for managing quarantined stock. This workbench shows all Analysis Requests, both current and history.

The Quality Control workbench can be accessed from the menu **Stock → Quality Control → Quality Control**.

The “Quality Control” drawer on the left list of the workbench shows a “To Do” list of all stock that needs to be tested by Quality Control.



The screenshot shows the 'Quality control' interface with a table of analysis requests. The table has two columns: 'Analysis req.' and 'Product'. The first row is highlighted in blue.

Analysis req.	Product
QUALAB010199	FF708317
QUANA0220159	RAW401
QUANA0220161	FIN402
QUANA0220196	RAW401
QUANA0230192	FG600-PRALINE
QUANA0230198	FG500-BULK
QUANA0230200	ZNUTRIENTEXAMPLE
QUANA0230201	FG500-BULK
QUANA0230202	FG500-BULK
QUANA0230203	FG500-5

As stock is tested, the workbench allows the QC results to be entered. If the QC results are passing, then the stock can be released to “A” status from the workbench. If the QC results are failing, then the stock can be released to an “R” status.

Procession provides the following enhancements to the Quality Control Workbench:

- Linked Transactions
- Enhanced QC Result entry based upon Product Technical Sheets
- Ability to enter results for multiple samples
- Ability to Post QE Results
- Certificate of Analysis report
- Statistical Analysis report
- Trend Analysis report

Quality control ALL : Quality Control Full entry Cancel

LINES

Analysis request Validated
 QUALAB010199

Stock site LAB01 Lab Workbench/Kitchen Site filter Original document Production declaration WOTLAB010003 Product FF708317 Natural Raspberry Flavor

GENERAL INFORMATION

Transaction group Control end date 07/24/18

DEFAULT VALUE

Status A

QUANTITY INFORMATION

'A' control status	LB	'Q' control status	1.000	'R' control status		Total	1.000
--------------------	----	--------------------	-------	--------------------	--	-------	-------

QUALITY CONTROL DETAIL

	*	Quality record	Lot	Expiration referen...	Expiration date	P_	PAC qty.	PAC-STK conv.	STK qty.	St_	Wareh...	Loc...	Location
1	F	<input type="text"/>	LOT123	07/24/2018	08/23/2018	LB		1.000000	1.000	Q	LAB	A1	

Linked Transactions

On the QC Workbench is a field called Original Document. This field shows the document number for the transaction that created the QC Workbench record. For example, this document number may be the production tracking number or the shipment return number. **Procession** provides the Linked Transactions feature to show other documents linked to this transaction.

Linked Transactions can be accessed from the **Procession** menu on the right panel of the QC Workbench window.

PROCESSION

- Linked Transactions
- Post QE Results

All > Procession > Quality Control Enhancements > Enhancements

Linked Transactions

Work order WONA0230109
 Sales order
 Purchase order
 Customer
 Delivery address

Procession automatically populates the fields on the Linked Transaction window. For example, if the QC Workbench record was created from a Production Tracking, **Procession** will populate the Work Order document number. If the work order is linked to a sales order, then the sales order number, customer and delivery address will be automatically populated. If the QC Workbench record is from a PO Receipt, then the Linked Transactions will display the PO number that is associated with the PO Receipt.

Quality Sheet - Result Entry Methods

On the QC Workbench, QC Results must be entered before a product can be released from “Q” status. There are 4 methods by which the QC Results can be posted on the QC Workbench.

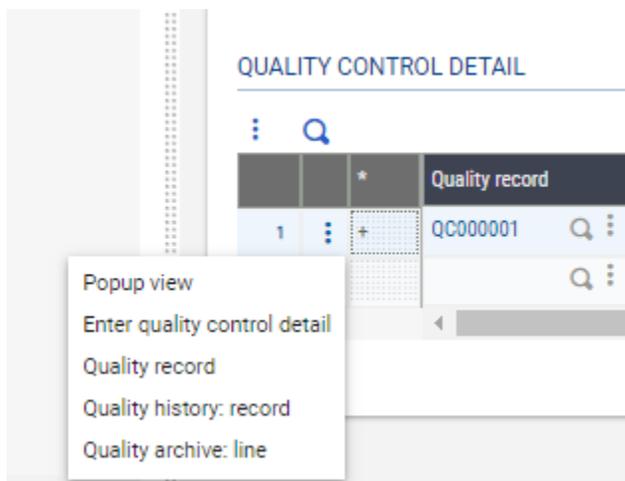
1. Enter QC results using Sage X3 standard functionality
2. Enter QC Results using **Procession** enhanced functionality
3. Post **Procession** “QC Results - Quick Entry” results to the QC workbench record
4. Import QC results using **Procession** import templates

Note that even though the Sage X3 standard QC functionality shares some of the same tables as the **Procession** enhanced functionality, the Sage X3 functionality is not interchangeable with the **Procession** functionality. In order to use all of the **Procession** QC functionality, it is recommended to use only the **Procession** methods of entering or posting QC results.

The four methods for entering or posting test results are described below.

Method 1 - Standard X3 QC Results

In the QC Workbench Quality Control Detail section, if the “Quality Record” column contains a standard Sage X3 technical sheet ID, then the Sage X3 method will be used for entering QC results. When using the Sage X3 method, results will be entered for questions from the Sage X3 technical sheet. When using the Sage X3 technical sheet, the **Procession** menu option for entering QC results (“Quality Record (**Procession**)”) is unavailable.



Using the standard X3 Method, selecting the Quality Record menu option displays the standard Sage X3 test result screen where QC results can be entered.

All > Procession > Quality Control Enhancements > Enhancements

Enter quality record

HOME PAGE 1

HOME

Record	QC000001	Pharma Raw Materials	Analysis no.	QUANA0220159	1
Product	RAW401 <i>Gelatin - B Type</i>	Gelatin - B Type	Qty.	1250.000 KG	Lot LO1110NA0220014

PAGE 1

Raw Material Certification	Material Grade	pH Test
----------------------------	----------------	---------

RESPONSES

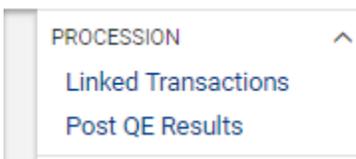
Yes/No Question	Yes
YES	Yes

Alpha Value List

B	B	pH	7
---	---	----	---

Method 2 – Post QE Results

If QC results were entered using the **Procession** Quick Entry (QE) feature, those results can be posted to a record in the QC Workbench (see [QC Results – Quick Entry](#)). The Post QE Results feature can be accessed from the right panel menu of the same name on the QC Workbench.

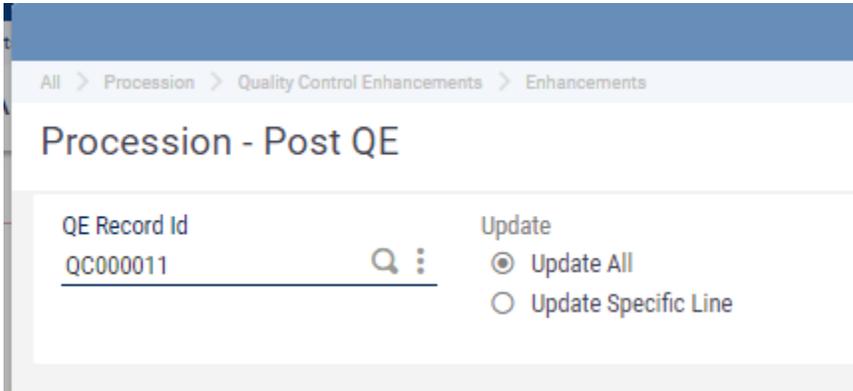


All of the types of QE Results can be posted against the QC Workbench record, including results of the type INPROCESS. However, only results of type FINAL will be used to determine the pass or fail status for the detail record on the QC workbench.

When selecting the Post QE Results option, the system will look for unposted QE results for that product and lot number. If a single QE record is found and there is a single record for the lot in the “Quality control detail” grid, then

those results will be automatically posted to the QC workbench record. However, if multiple QE records are found for the product and lot, or there are multiple lot records in the “Quality control detail” grid, then the user will be asked to select which QE Results record to post.

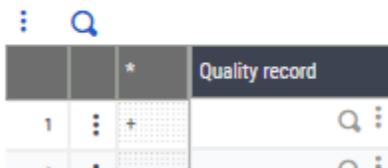
Below is an example of the Post QE window.



If the update type is set to “Update All” (default) then all records in the Quality Detail section of the QC Workbench are updated with the Quick Entry results. However, if the option “Update Specific Line” is selected, then only one line will be updated.

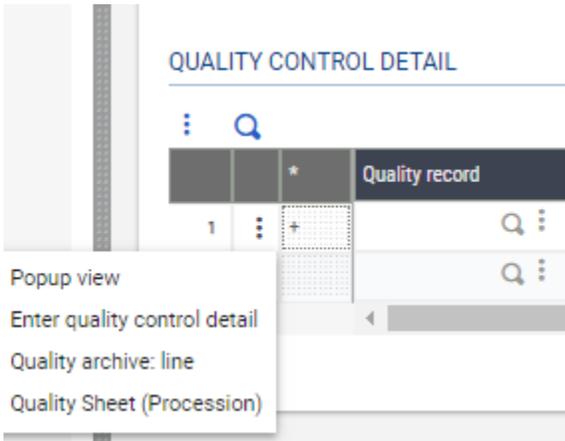
When the QE results are posted to the QC Workbench, the system checks the results from the last sample of the type FINAL. If that sample’s results are all passing, then the quality control detail record is marked as passing, and is flagged with the “+” sign below (See [Quality Control Statuses](#) for more information on the values of the “*” column).

QUALITY CONTROL DETAIL



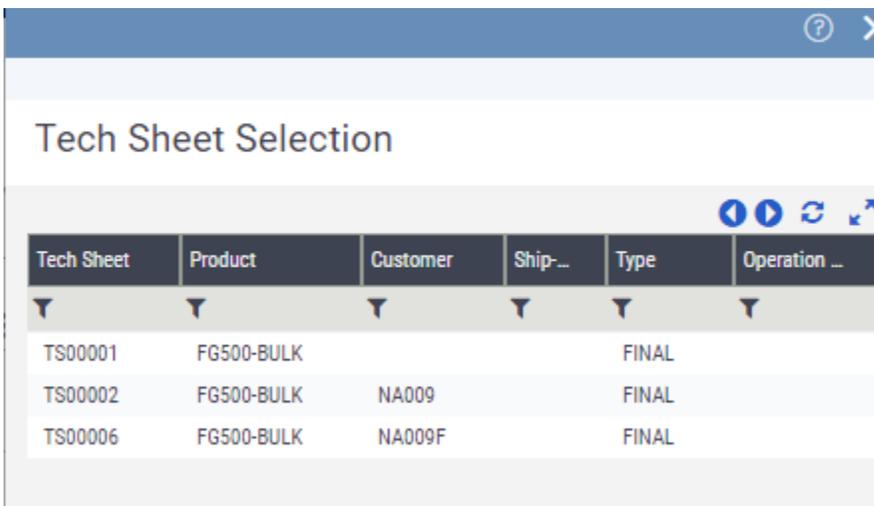
Method 3 - Procession QC Results

QC results can be manually entered on the QC Workbench using the **Procession** QC Results feature. This feature allows the entry of results for one or more samples and allows the selection of the Product Technical Sheet, if more than one exists for the product. The QC Results feature is accessed from the menu option “Quality Sheet (Procession)”, which is accessed from the action card menu on the Quality Control Detail record in the QC Workbench.



After selecting this option, QC results can be entered on the QC Results screen by first clicking the “New” button. If multiple Product Technical Sheets exist for the product a selection dialog may appear, allowing the user to select the Product Technical Sheet to use.

Note: The display of the dialog shown below is controlled by the Procession parameter XJBQCSPECS. The default value for this parameter is “Ask”.



The questions from the selected Product technical sheet are automatically displayed in the QC result record. Additional questions can also be added on the fly. If the Quality Control record was created by the receipt of a Purchase Order then only questions that are flagged as PO questions on the Product Technical Sheet are shown. If the Quality Control record was not created by a Purchase Order receipt, then only the questions flagged as Non-PO on the Product Technical sheet are shown.

Procession-QC Results

QC Response

Sample ID * 001 Product → FG500-BULK Lot Analysis request QUANA0230035 Entry line no. 1
Paint-Low VOC Acrylic Gloss

Technical Sheet ID TS00028 Technical Sheet Type FINAL

Sample Receipt Date 06/04/20 Time In 09:10:27 Sample Pulled By Test Completion Date 07/21/20 Time Out 13:05:29 Checked By DJP

QC Response

	Question	Question title	P...	Answer	Y...	Date	Question Text
1	QC05	% Solids	I	33	<input type="checkbox"/>		
2	QC03	pH	I	55	<input type="checkbox"/>		
3	QC07	% Moisture	P	55	<input type="checkbox"/>		
4	QC70	Density (Weight Per Gallon)	P	55	<input type="checkbox"/>		
5					<input type="checkbox"/>		

When entering the QC results, the data is validated against the specifications that were defined on the Product Technical Sheet.

Once the results for one sample are entered and saved, click the refresh button from the right panel to see a list of all samples in the left list. Additional samples can be added by clicking the “New” button and entering the results for the next sample.

Example of the QC Results left list showing 4 samples that have been tested.

Quality Control Answers

Analysis req.	Sample ...	Product
QUANA0230202	001	FG500-BL
QUANA0230202	002	FG500-BL
QUANA0230202	003	FG500-BL
QUANA0230202	004	FG500-BL

The following sections define each of the fields on the QC Results screen.

Procession QC Results – Header Section

Procession-QC Results

QC RESPONSE

Sample ID *	Product	Lot	Analysis request	Entry line no.	Sample Receipt Date	Time In
005	FG500-BULK	LO1811NA0230002	QUANA0230202	1	02/06/19	09:03:37
Sample Pulled By	Technical Sheet ID	Test Completion Date	Time Out	Checked By		
				ADMIN		
Technical Sheet Type						

The Header section shows information about what is being tested, who is testing and the amount of time that the sample spends in the lab before the testing is completed.

The fields on this section are:

1. **Sample ID** – ID number for the sample. By default, this number starts at “001” for the first QC results entered for an analysis request. When new samples are created, the Sample ID is automatically incremented. However, this number can also be manually entered.
2. **Product** – Product that is being tested.
3. **Analysis Request** – Analysis Request ID from the QC Workbench record.
4. **Entry line no.** – Line number from the Quality Control Detail section of the QC Workbench record.
5. **Sample Receipt Date** – Date that the sample was received for testing. The date and time values are for reference only, but can be used to track QC turn-around times.
6. **Time In** – Time that the sample was received into the lab.
7. **Sample Pulled By** – Person who pulled the sample.
8. **Test Completion Date** – Date that the test completed. This field and the Time Out can be automatically populated by clicking into this field.
9. **Time Out** – Time that the testing was completed.
10. **Checked By** – Person who has certified the test results. This person’s name will print on the Certificate of Analysis next to the label “Certified by”.

Additional Details:

Certified by: David Padgett

Procession QC Results – Grid Section

QC RESPONSE

	Question	Question title	P...	Answer	Ye...	Date	Question Text	Test method	Comments	Target Value	Start Value	End Value	Non-st...	New reco...	Response type	Control type	C...	Blocking ty
1	QC03	pH	I	4.2	<input type="checkbox"/>			PHINDICAT		7	6.5	7.6	Yes		Numeric	Ranges		Status block
2	QC05	% Solids	P	12	<input type="checkbox"/>					7	4	12	Yes		Numeric	Ranges		Status block
3	QC07	% Moisture	P	5	<input type="checkbox"/>					4	2	6	Yes		Numeric	Ranges		Status block
4	QC70	Density (Weight Per Gallon)	P	1.2	<input type="checkbox"/>					0	1.05	1.2	Yes		Numeric	Ranges		Status block
5					<input type="checkbox"/>													

INSTRUCTIONS

The QC results are entered in the grid section. The image below shows the fields from the grid in the pop-up view.

The screenshot shows a detailed form for entering QC results. The fields are organized as follows:

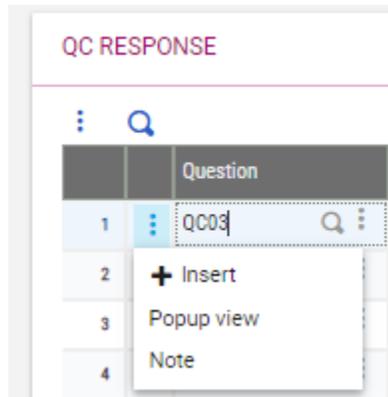
- Question ***: Question title (e.g., "% Solids"), Pass/Fail (e.g., "I"), Answer (e.g., "33"), Yes or True (checkbox), Date.
- Question Text**: Question Text, Test method (e.g., "PHINDICAT"), Comments, Target Value (e.g., "7").
- Start Value**: Start Value (e.g., "4"), End Value (e.g., "12").
- Non-standard allowed**: Yes (checkbox), New record (checkbox).
- Response type**: Response type (e.g., "Numeric"), Control type (e.g., "Ranges").
- Control table**: Control table (e.g., "Status block"), Blocking type (e.g., "Status block"), Tracking type (e.g., "Quality control tracking"), Grouping (checkbox).
- Add. Text**: Add. Text (e.g., "No"), CoFA (e.g., "Yes"), PO (e.g., "No"), Allocation date.
- Test Level**: Test Level (e.g., "1"), Seq (e.g., "1"), Allow Ignore (checkbox).
- CoA Result**: CoA Result (e.g., "33"), Test Level (e.g., "1"), Level 1 Line # (e.g., "0"), Question Seq Number (e.g., "0").
- Previous Level - Qst**: Previous Level - Qst.

Users are able to enter the test results in the grid section. Based upon the entered result, the Pass/Fail column will indicate if the result is acceptable, which is also referred to as standard. If a result is non-standard and the question is defined to require a “New Record” for non-standard responses, then an additional QC result window will be displayed allowing for the secondary level questions and results ([Procession QC Results – Next Level](#)).

Most of the fields in grid section are from the Product Technical Sheet and are included on the QC results screen for reference. The fields that are specific to the QC results feature or can be edited in this grid are:

1. **Pass/Fail** - Determines if the question has a passing result. Values are “P” for Pass, “F” for Fail, and “I” for incomplete.
2. **Answer** – Result field for alphanumeric or numeric questions.
3. **Yes or True** – Result field for questions that are of the type Boolean.
4. **Date** – Result field for questions of type Date.
5. **CoA Result** – Result field which prints on the CoA, so it is therefore the result that is shown to the customer. This field is automatically populated when the internal result answer fields (“Answer”, “Yes or true” or “Date” fields) are populated. This field value would only need to change if the internal result needs to be adjusted or converted before displaying to the customer.
6. **Question Text** – Additional question information or notes.

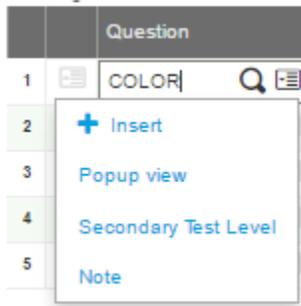
7. **Test Method** – Test method that was used for determining the QC Result. The value in this field will print on the Certificate of Analysis with the results.
8. **Comments** – Short user comments providing more information regarding a QC result.
9. **Tracking type** – Non-editable field that indicates whether the analysis request originated from production tracking or from another source. The options are “Quality Control Tracking” and “Work Order Tracking”.
10. **Grouping** – Group defined on the question.
11. **Additional Text** – If the value is “Yes”, then a note has been added to the QC result. Notes are added using the action card menu to the left of the question column in the QC Results grid. Notes allow unlimited text to be added for the result. This additional text is for reference only and does not print on any standard report.



12. **CofA (Changed in Neon)** – Indicates whether the question will print on the CoA. This field is read-only for questions that originate from the Product Technical Sheet. However, if a question is added on-the-fly, then this field can be changed in order to control whether the question will print on the CoA.
13. **Test Level** – By default, the initial questions will have a test level of “1”. If a result is non-standard and the question requires a “Next Sheet” or “New Record”, then those results will show as test level “2”.

When a non-standard response is added for this type of question, the secondary level questions are automatically displayed based upon the standard Sage X3 technical sheet that has been assigned to the question.

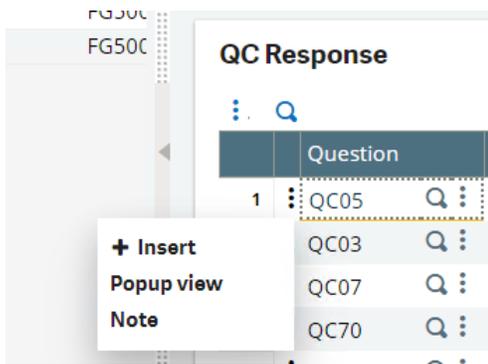
If a question has results that were previously entered at the secondary level, those results can be accessed from the action card menu on the QC Results grid. The option is called “Secondary Test Level”.



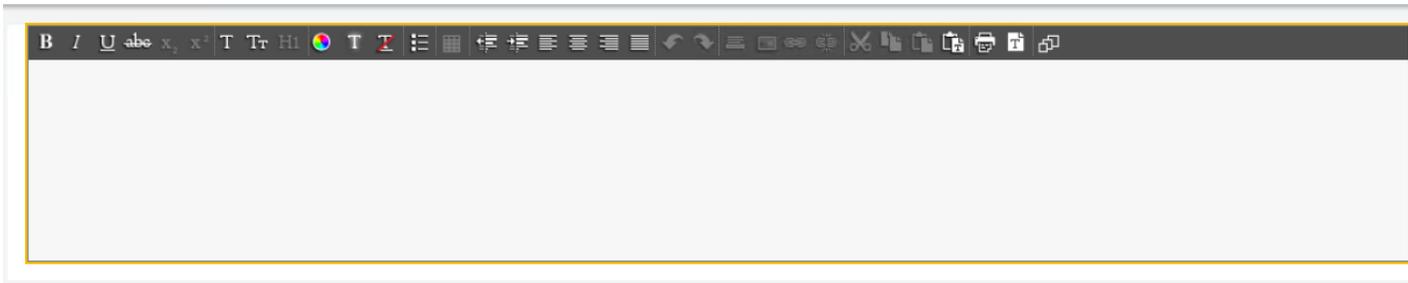
- 14. **Sequence** – Defines the order in which the questions appear.
- 15. **Test Level/Level 1 Line #/Question Seq Number/Previous Level Qst** – Fields used by the import template. These fields can be ignored during data entry.

Procession QC Results – Note

On each row of the results grid is an action menu called “Note”. This option allows memo data to be stored for each question.

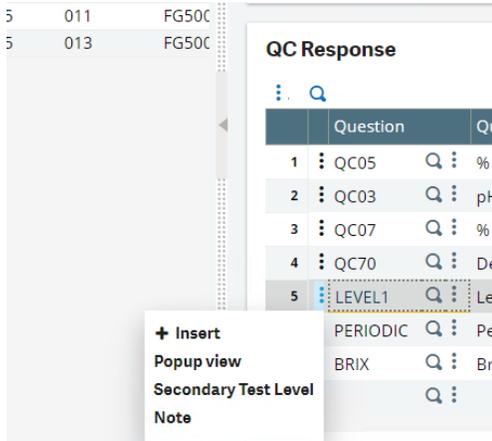


Text entry ?

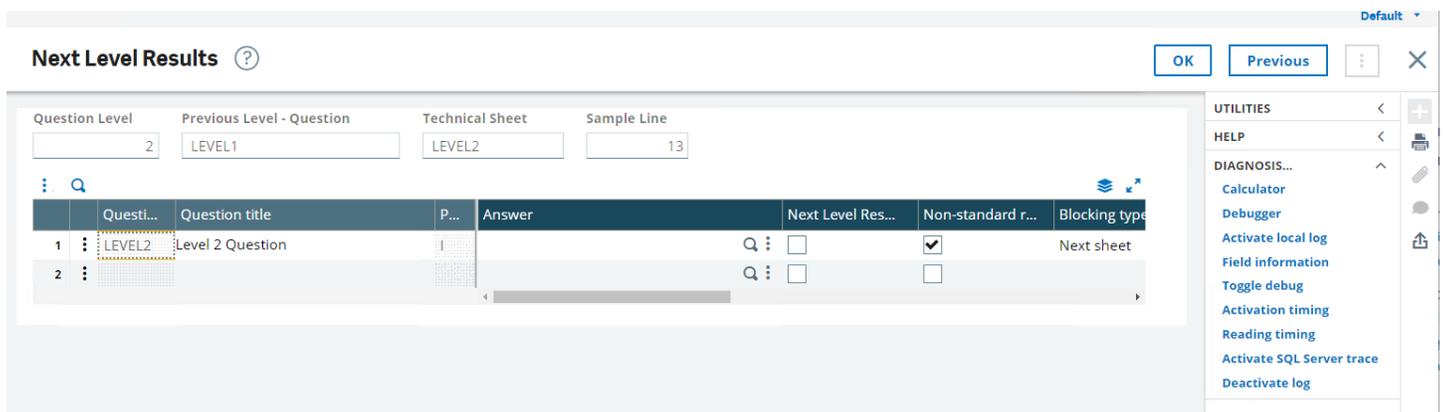


Procession QC Results – Next Level (Redesigned for Neon)

If an invalid result is entered for a question that has a “New Record” defined, then a next level question window will appear with the question from the Sage X3 technical sheet defined by the “New Record”. The next level results can also be accessed from the Action Menu “Secondary Test Level” on the QC Response window.



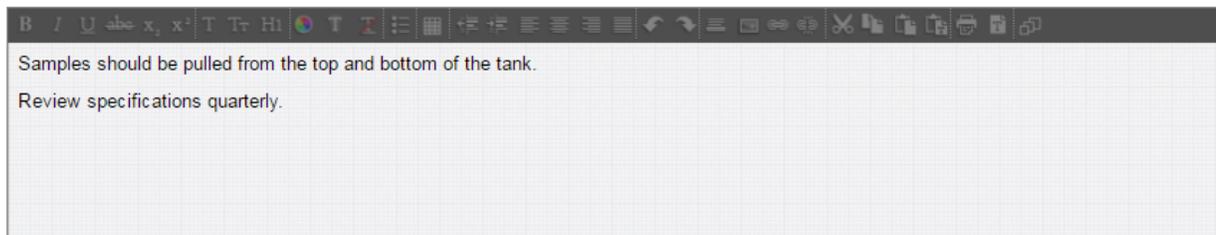
The Next Level Results window is the same window used by the Quick Entry feature. Refer to [Next Level Results](#) in Quick Entry for more information on the functionality for this window. This window supports up to 5 levels of questions.

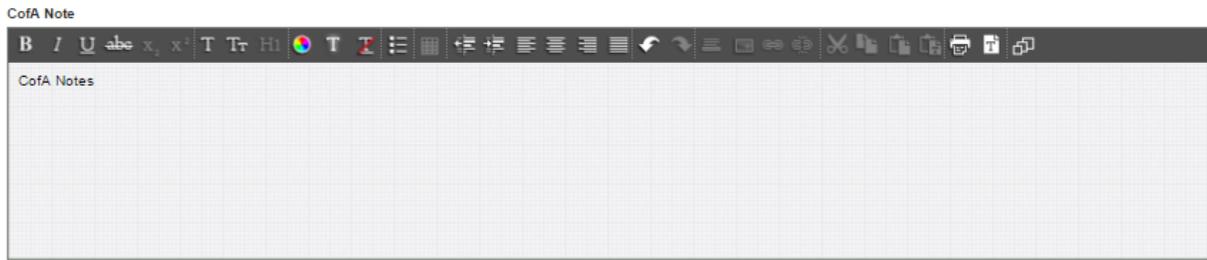


Procession QC Results – Instructions Section

The instructions section shows lab instructions that were entered on the Product Technical Sheet and is the place to enter notes that will print on the Certificate of Analysis.

INSTRUCTIONS

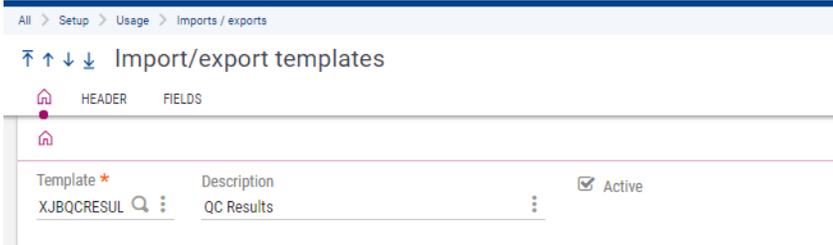




The two text boxes are found in the instructions section are:

- **QC Instructions** - QC instructions from the Product Technical Sheet.
- **CofA Notes** – Notes which will print on the Certificate of Analysis.

Method 4 – Import QC Results



QC results from external systems can be imported into the QC Workbench, using the **Procession** import/export template “XJBQCRESUL”. Examples of external systems are lab equipment or third party applications. Imported results are posted to the Procession QC Results feature.

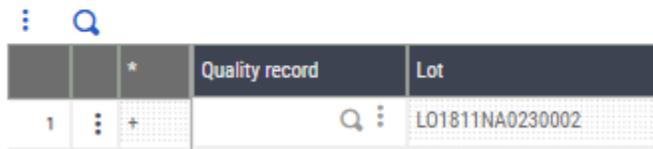
If regularly importing from a text file from an external source, it is recommended to create a “Table setup/import”. This feature allows the mapping of the format of the text file to the format required by the **Procession** template. This feature can be accessed from the menu **Setup→Usage→Imports/Exports→Table setup/import**.

For more information about importing using **Procession** templates, refer to the **Procession Setup & Technical Guide**.

Quality Control Statuses

After QC results have been entered or imported on the Quality Control Workbench, the status of the analysis request will be determined by the system. The status shows in the Quality Control Detail grid of the Quality Control Workbench. The status determination is based upon the QC Results of the type FINAL for the last sample for the Quality Control Detail record. The status shows in the column that is labeled with an asterisk “*”.

QUALITY CONTROL DETAIL



	*	Quality record	Lot
1	+	Q	LO1811NA0230002

The value in this status field determines whether the stock can be released back into inventory or whether the stock should be rejected. The standard Sage X3 statuses are:

1. **“F”** - QC results have not been entered and therefore the product cannot be released.
2. **“R+”** – A failing QC result was entered. This stock can only be released back into inventory with an “R” stock status. An “A” stock status is not allowed for this stock, since there was a failing result.
3. **“+”** – The QC results are passing and therefore the product can now be released into stock with an “A” stock status.
4. **“*”** – The product has been previously released and has been moved to the History drawer on the left list.

Editing Archived Results

After product is released from quarantine, it is archived in Sage EM. Archived QC Workbench records are found in the History drawer on the left list.

Quality control



Analysis req.	Product
QUALAB010199	FF708317
QUANA0220159	RAW401
QUANA0220161	FIN402
QUANA0220196	RAW401
QUANA0230192	FG600-PRALINE
QUANA0230198	FG500-BULK
QUANA0230200	ZNUTRIENTEXAMPLE
QUANA0230201	FG500-BULK
QUANA0230202	FG500-BULK
QUANA0230203	FG500-5

Last read
History

By default, **Procession** provides the ability to edit archived results. The primary purpose for this feature is for products which are shipped before all tests results have been returned. An example would be a paint company which may choose to send their product to a client before a “curing” test has been completed. This curing test may be a 24-48 hour test that passes 99.9% of the time. The paint company decides that it is more economical to ship the product before the curing test has completed and to recall the product the 0.1% of the time that it fails. This company chooses to release the product before the curing test completes and to enter the results of the curing test after it has completed. The Certificate of Analysis would then be printed and sent to the customer after all results have been entered.

For companies that decide to enter QC Results after archiving, we recommend the following:

1. Determine which questions must have passing results before a product can ship. Also determine which questions can have results entered after the product has been released to “A” status. If a question’s result is not required to be entered before the product is released, then setup that question on the Product Technical Sheet with the “Allow Ignore” option.
2. When entering results in the QC workbench, skip over the questions that are set to Allow Ignore. If a user clicks or tabs into the Answer fields for an Allow Ignore question, the system will attempt to validate the answer, even if one was not entered.
3. Save the QC results. If all results are passing for the questions that were not skipped then release the stock to an “A” stock status. The system will archive the QC Workbench record at this time.
4. Once the QC results have been determined for the questions that were marked as “Allow Ignore” then find the QC record in the history drawer on the left list of the QC Workbench. Enter the QC results.
5. If the QC results entered in #4 are passing then print out the Certificate of Analysis and send it to the client.
6. If the QC results entered in # 4 are NOT passing, then either:
 - a. Issue a recall for the product or
 - b. If the product is still in stock, change its stock status to either “Q” or “R” using either the Sage X3 Stock Status Change feature or create a new QC Workbench record for the stock using the Analysis Request feature.

Quality Control Reporting

Procession provides the following QC reports:

- **Certificate of Analysis at QC**
- **Certificate of Analysis at Delivery**
- **Statistical Analysis**

These reports are described in the following sections.

Certificate of Analysis (CofA)

Procession provides Certificate of Analysis reports that can be used to communicate quality test results to a customer.

The two versions of the Certificate of Analysis are:

- **CofA at QC** – The CofA at QC report can be printed from the Quality Control screen.
- **CofA at Delivery** – CofA version printed from the Delivery screen.

The two versions of the CofA are described in the following sections.

Certificate of Analysis (CofA) at QC

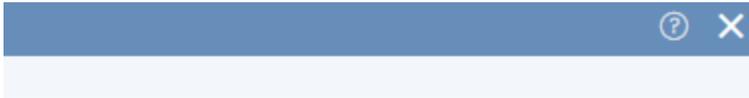
The CofA can be printed directly from the Quality Control Workbench window after test results have been entered.

The QC Workbench can be accessed from the standard Sage X3 Stock menu or by navigating to **Procession → Quality Control Enhancements → Enhancements → Quality Control**.

This CofA can be printed for either open or archived analysis requests. Open analysis requests are found in the “Quality Control” drawer in the left list of the QC Workbench. The archived analysis requests can be found in the left list under the “History” drawer in the left list of the QC Workbench.



To print the CofA, select the Printer Icon and select “Record”. The **Procession** CoA is named “XJB2CERTOFANA”.



Selection Print codes

Type	Code	Title
Reports	XJB2CERTOFANA	Procession-CofA
Reports	XJB2QCANALYSIS2	Procession-StatisticalAnalysis

Report code *
XJB2CERTOFANA Procession-CofA

PARAMETERS

Parameter title	Parameter type	First value	Final value
1 : Sample ID Range	Range	004	004
2 : Quality Control Record	Single	QUANA0230202	
3 : Supplier/Shipper	Single		
4 : Tech Type	Single	FINAL	
5 : Customer	Single		
6 : Address	Single		
7 :			

REPORT DESTINATION
Destination Default

The report parameters are:

1. **Sample Range** – By default, this range is set to be the last sample ID of the type FINAL. However, this range can be changed to either print the results from a different sample or for a range of samples.
2. **Quality Control Record** – Defaults to the current analysis request ID for the QC Workbench record.
3. **Supplier/Shipper** – By default, if this field is blank, then the logo that prints on the CoA is the logo that is setup for the company. The company logo is setup in Sage X3 under the menu **Setup**→**Organizational Structure**→**Companies**.

In some cases, a different logo may be required on the CoA, other than the company logo. This can occur if:

- a. The product is for a division within the company that has a different logo than the main company or
- b. The product is being blind-shipped, where the logo for distributor must show instead of the company that produced the product.

Both of these scenarios can be handled without modifying the report in Crystal Reports. Instead, a record for the division or distributor would be setup in the Procession Shipper/Emergency Response feature and a logo assigned. Next, this Shipper would be entered or selected in the Supplier/Shipper field of the CoA report criteria.

A requirement for the use of this feature is that **Procession** Distribution Module must be installed. A Shipper/Emergency Contact can be setup under **Procession-->Distribution Enhancements->Maintenance/Setup->Shipper/Emergency Contact**. For more information on this feature, refer to the **Procession** Distribution Module User Guide.

4. **Tech Type** – Specifies which type of QC results to show on the CofA. By default, this is set to FINAL, which would exclude all results that are not of the type FINAL.
5. **Customer** – If the customer is specified, then the customer product name and product description will display on the CofA, if found. If the customer is not specified, then the default product name and description will display. Also, when a customer is specified, the CofA uses the specifications from the Product Technical Sheet that matches the product and customer.
6. **Address** – If an address is specified, then the specifications on the CofA are based upon the Product Technical Sheet that matches the product, customer and address.

If a customer is specified and customer specifications have been defined for the product, those specifications (target, spec high, spec low) are displayed on the CofA. If a customer is not specified, or if customer specifications do not exist, then the product specifications are displayed on the report.

If a product is a packed item and no specifications have been defined for the product id, then the specifications for the bulk product are shown on the CofA. A requirement for the use of this feature is that **Procession** Formulation module must be installed. Refer to the “Production BOM” section of the **Procession** Pre-sales/Formulation User Guide for more information on how to map a packed item to a bulk item.

Example of the **Procession** Certificate of Analysis:



Our Company, Inc.

CERTIFICATE OF ANALYSIS

Product Information:

Lot Number: LO1811NA0230002
Product Description: Paint-Low VOC Acrylic Gloss
Product #: FG500-BULK
CoA Number: QUANA0230202
Date: 11/07/2018

Characteristics	Test Method	Target	Spec Low	Spec High	Result
% Solids		7.00	4.00	12.00	5.00
% Moisture		4.00	2.00	6.00	5.00
Density		1.14	1.05	1.20	1.10
pH	pH Indicator	7.00	6.50	7.60	7.00

Additional Details:

Certified by: David Padgett

Certificate of Analysis (CofA) at Delivery

The CofA can also be printed from the Delivery Screen which can be accessed from the standard Sage X3 menu or by navigating to **Procession → Distribution Enhancements → Distribution → Enhancements → Deliveries**.

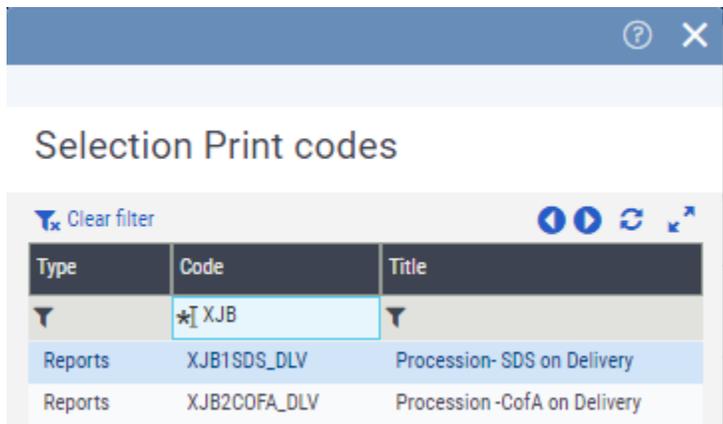
The advantages of printing the CofA from the Delivery window over printing from the Quality Control Workbench are:

1. CofA automatically prints for each lot that has been picked for delivery.
2. The CofA can be printed when the product is ready to ship, instead of printing and storing the CofA when the testing is performed.
3. The Customer, Address and Shipper/Supplier criteria are automatically populated on the CoA report criteria when printing from the delivery.

Note that when printing the CoA from the delivery, the report criteria does not have an option for sample number or range. Instead, the system will automatically determine and print the last sample of type FINAL for each lot.

Standard Sage X3 provides functionality that can be used to automatically print or email the CofAs. For example, CofAs can be emailed to customers using the Sage X3 Workflow feature. Refer to the Sage X3 help documentation for more information about how to setup reports to automatically print or email.

To print the CofA from the Delivery screen, click on the printer icon and select “Record”. Select the report “XJB2COFA_DLV”.



The report parameters are shown below. By default, CofA’s will print, when available, for all lots for the delivery. Enter a specific product range or lot range if you need to limit the CofA’s that print for this delivery.

All > Procession > Distribution Enhancements > Enhancements

Enter report parameters

Report code *
XJB2COFA_DLV Procession -CofA on Delivery

PARAMETERS

7 Results Display: 50

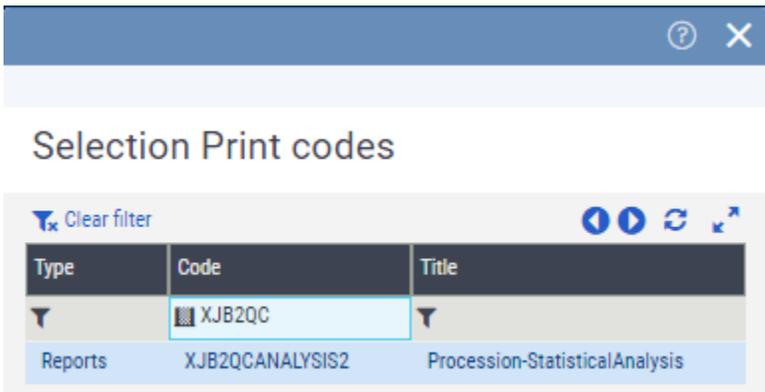
	Parameter title	Parameter type	First value	Final value
1	Shipment	Range	SHPNA0230058	SHPNA0230058
2	Product range	Range		
3	Lot range	Range		
4	Quality Control Record	Single		
5	Supplier/Shipper	Single		
6	Company Logo	Single	A010	
7	Customer	Single	NA009	
8				

QC Statistical Analysis

The QC Statistical Analysis report is used to review trends and analyze QC results. This report provides the following features for analyzing QC result data:

- Tables containing the raw QC results.
- Statistical Analysis showing the calculated mean, standard deviation and failure %.
- Trend Analysis that graphs the change in results over time.

The QC Statistical Analysis report can be accessed from either the **Reports->Reports** menu in Sage X3 or from the Quality Control Workbench (**Stock→Quality Control→Quality Control**).



Enter report parameters

Report code *

XJB2QCANALYSIS2

Procession-StatisticalAnalysis

PARAMETERS

15 Results Display: 50

	Parameter title	Parameter type	First value	Final value
1	Quality Control Record	Range		
2	Work order range	Range		
3	Product reference range	Range	FG500-BULK	FG500-BULK
4	Lot number	Range		
5	Control End Date	Range	01/01/2017	12/31/2019
6	Sample ID Range	Range		
7	Question # Range	Range		
8	Site range	Range		
9	Tech Type	Single		
10	Group by	Single	Product+Question	
11	Standard Deviation for outlier	Single	3.700000	
12	Lot Sample to Use	Single	Maximum	
13	Report Session	Single	15307359524ADMI	
14	Display Graphs	Single	Yes	
15	Display Sublevels	Single	Yes	
16				

The report criteria for this report are:

1. **Quality Control Record** – Range of Analysis Requests for the QC Workbench records
2. **Work Order Range** – Range of Work Orders. This range is only used when reviewing QC results for production tracking receipts.
3. **Product Reference Range** – Range of products.
4. **Lot number** – Range of Lot Numbers.
5. **Control End Date** – Range of Control End Dates. By default, control end dates are calculated as the date of the receipt plus the quality control lead-time. This field shows on the QC Workbench and can be modified.
6. **Sample Id Range** – Range of samples. Since the number of samples can vary, this range is typically used when:
 - a) Reviewing the quality of first samples (“001”) or
 - b) Manual Sample numbers are entered for the QC results in order to denote key events such as “FIRSTARTICLE” for First Article Inspection or “CALCULATED” for Calculated Results.
7. **Question # Range** – Range of questions.
8. **Site range** – Range of Sites for the QC Workbench records.
9. **Tech Type** – If specified, only show this type of QC results. Examples would be “FINAL” or “INPROCESS”, etc.
10. **Group By** – Indicates if the QC results should be grouped by Question or Product + Question on the report.

11. **Standard Deviation for outlier** –Used to eliminate outliers. The default is 3.7, which means that any results that are more than 3.7 times the Standard Deviation from the mean will be eliminated from the result set.

For example, a data set consists of the following numbers: 2150, 2148, 2146, 2151, 2158, and 0. The standard deviation for this data set is 877.988 and the mean as 1792.167. In this example, the 0 was a user entry error and we want to eliminate it from the results. Since the '0' is 2.04 times the standard deviation from the mean, setting the "standard deviation outlier" report criteria to 2, will eliminate the value "0" from the data set. After this value is eliminated, the new standard deviation is 4.5607 and the new mean is 2150.6. Each time these values are recalculated the system will look for additional outliers and eliminate the outliers if they are found.

12. **Lot Sample to Use** – Options for this field are: minimum, maximum and all. If set to the value "Maximum", then the highest sample number for each lot will be included in the data set. If the Tech Type criteria is also specified on the report criteria (example "FINAL") and "Maximum" is selected, then the highest sample of the selected Tech Type will be included in the data set.

13. **Report Session** –Automatically generated field indicating the current session. This number should not be changed.

The report session number is shown in the report criteria in order to allow access to the report data for advanced analysis. The results of the report will be stored into tables and the records for this report can be accessed using this report session number. This report data is stored into the tables XJBQCANA and XJBQCANARSLD. Note that the data in this table is temporary and the data is automatically cleared out the next time the report is run.

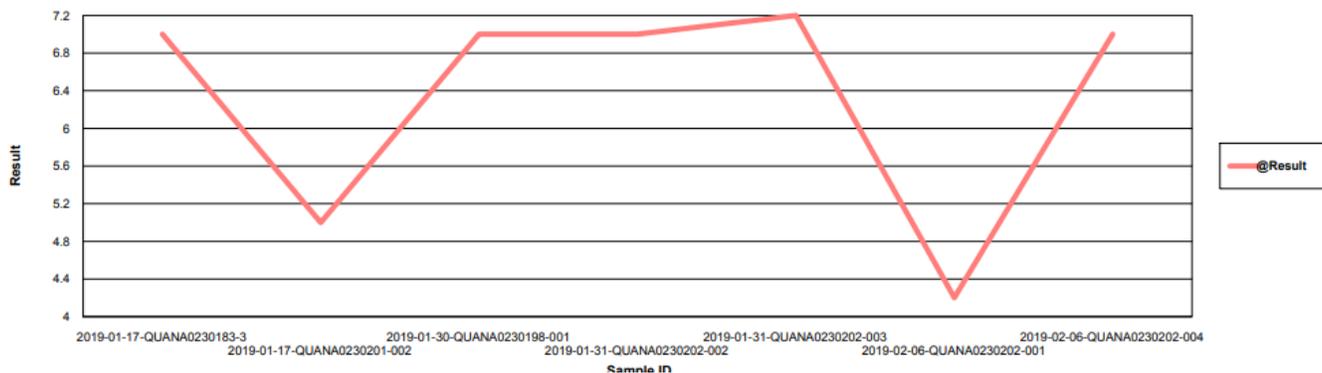
14. **Display graphs** –Indicates whether the trend graph should be shown on the report.
15. **Display sublevels** – Some QC results may have an additional level of results. This occurs when the question is setup to have a blocking type of "Next Sheet" and the first level result is invalid. The Display Sublevels report criteria specifies whether the "Next Sheet" results should show in the data set.

QC Analysis Report

Report Session: 15307359657ADMI
Print Date: 2/6/2019

	Result	Pass/Fail	Target	Low	High	Add. Level	Short QC#	Product	Lot	Quantity	Units	Comments
FG500-BULK Paint-Low VOC Acrylic Gloss												
QC03 pH												
001	7	Pass	7	6.5	7.6	No	30198	FG500-BULK	LO1705NA0230005	1.00	LB	
001	4.2	Fail	7	6.5	7.6	No	30202	FG500-BULK	LO1811NA0230002	864.00	LB	
002	5	Fail	7	6.5	7.6	No	30201	FG500-BULK	LO1811NA0230001	834.00	LB	
002	7	Pass	7	6.5	7.6	No	30202	FG500-BULK	LO1811NA0230002	864.00	LB	
003	7.2	Pass	7	6.5	7.6	No	30202	FG500-BULK	LO1811NA0230002	864.00	LB	
004	7	Pass	7	6.5	7.6	No	30202	FG500-BULK	LO1811NA0230002	864.00	LB	
3	7	Pass	7	7	8	No	30183	FG500-BULK	LO1706NA0230001	100.00	LB	

No. Samples	7.00	No. Failures	2.00
Mean	6.34	No. Incomplete	0.00
Standard Deviation	1.12	% Failure	28.57



On the report, failing results show in red in the table. Incomplete results show in purple.

On the trend graph, the each data point is shown in chronological order.

Delivery Customer Specification Verification

During the creation of a delivery from a sales order, **Procession** verifies that the selected lots meet the customer's specifications.

This verification is performed using:

1. Customer specifications for the product and customer combination.
2. The last QC results for the lot number.

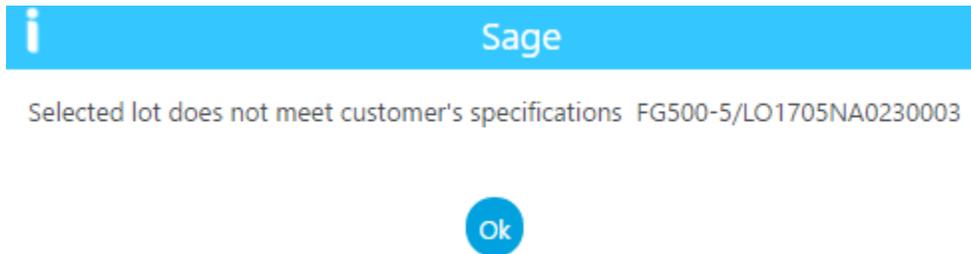
The following system configuration is required in order to use this feature:

1. Lot numbers must be unique and two unrelated products must not share the same lot number.
2. If a product is repackaged then either:
 - a. QC results must be entered for the repackaged product OR
 - b. The repackaged product must retain the previous lot number.

When **Procession** performs this verification, it looks for the last QC results that were entered for the lot number, regardless of the product number associated with the lot.

If the lot does not meet the customer specifications, the user is presented with a soft warning. The soft warning allows the user to determine whether the customer will accept the lot or if the lot needs to be replaced with an acceptable one.

An example of this warning is shown below.



Technical Requirements (New in Neon)

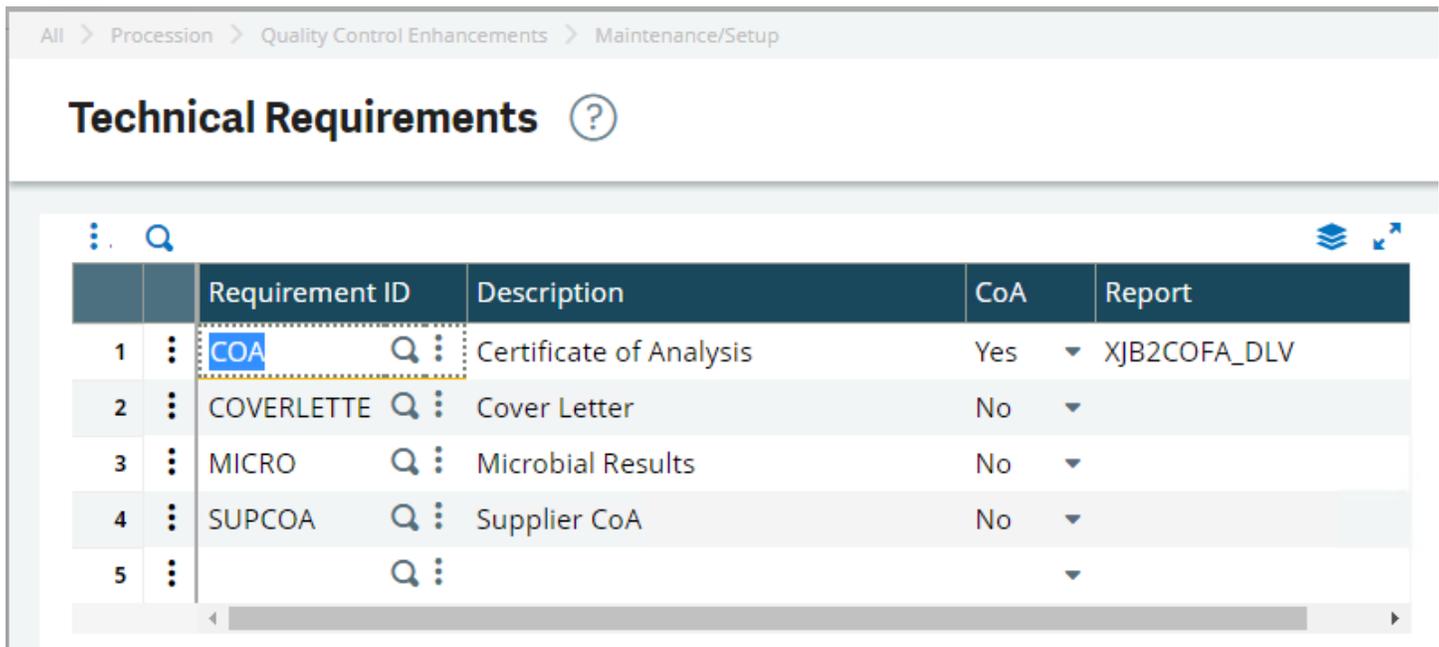
Technical Requirements are documents or tasks that must be performed when a product is order or delivered to a customer.

The benefits of this feature are:

- Define the Lab documents that are required to be distributed with a product
- Define Lab documents that are required by customer
- Automatically track when a Certificate of Analysis has been printed or sent to the customer.
- Assign report versions or custom reports by product or customer
- Attach and track documents
- Specify lab-related tasks for an sales order

Technical Requirements Master Data

The master Technical Requirement records can be accessed from the menu **Procession**→**Quality Control Enhancements**→**Maintenance/Setup**→**Technical Requirements**.



	Requirement ID	Description	CoA	Report
1	COA	Certificate of Analysis	Yes	XJB2COFA_DLV
2	COVERLETTE	Cover Letter	No	
3	MICRO	Microbial Results	No	
4	SUPCOA	Supplier CoA	No	
5				

The fields on this window are:

- **Requirement ID** – User defined ID code for the requirement.
- **Description** –
- **CoA** – If this field has a value of “Yes”, then the requirement is a Certificate of Analysis (CoA). This flag is used to automatically update the delivery status and date on a sales order

Note: The Procession standard CoA report that is printed from the Delivery is named “XJB2COA_DLV”. In the X3 Report Dictionary, this report has a script called XJBSPVSDHCOA. This script automatically updates the “Delivered” and “Delivery Date” fields on the Sales Order Delivery/Regulatory tab. This update occurs when the report is printed or emailed from the Delivery record. If a custom CoA report is created, then the XJBSPVSDHCOA script should be added to the custom report.

- **Report** – Defines the name of the report to use for this Technical Requirement. Note that the report value is optional and some Technical Requirements may not have a report associated with it.

Formula Technical Requirements

Technical Requirements can be assigned to a formula from the Formula task. The Formula task can be accessed from the menu **Procession**→**Formulation Module**→**R&D Formulas**. The Technical Requirements are located on the Specifications tab.

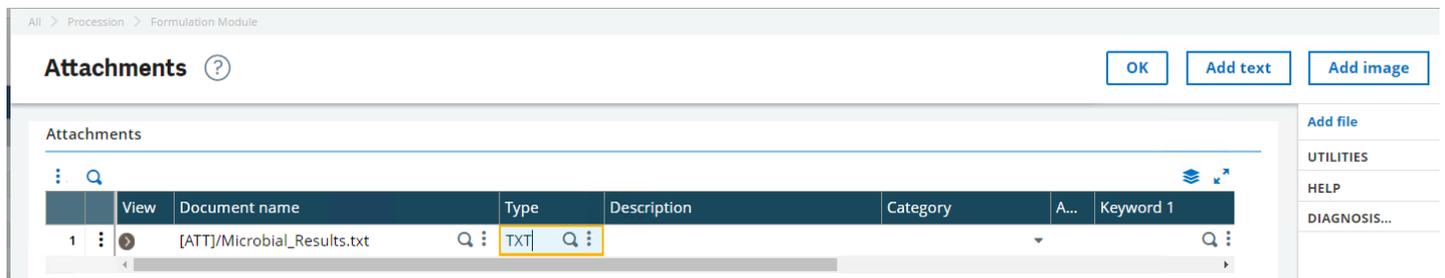
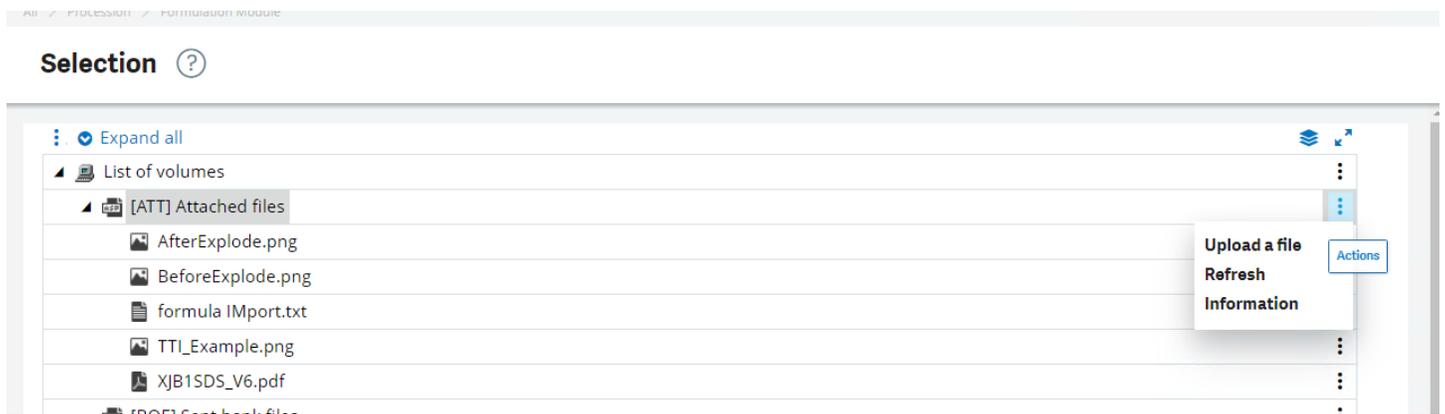
Requirement ID	Description	Report	CoA	Attachment
1	COA : Certificate of Analysis	XJB2COFA_DLV	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	MICRO : Microbial Results		<input type="checkbox"/>	<input type="checkbox"/>
3	SUPCOA : Supplier CoA		<input type="checkbox"/>	<input type="checkbox"/>

The fields in this section are the same in previous section, with the exception of the Attachment checkbox. The attachment checkbox is used to link an attachment to the Technical Requirement.

To add an attachment, first click in the Attachment checkbox.

View	Document name	Type	Description	Category	A...	Keyword 1
<input type="checkbox"/>						

Click on the magnifying class in the document name field to either select an existing file on the server, or to upload a file from your local computer as shown below.



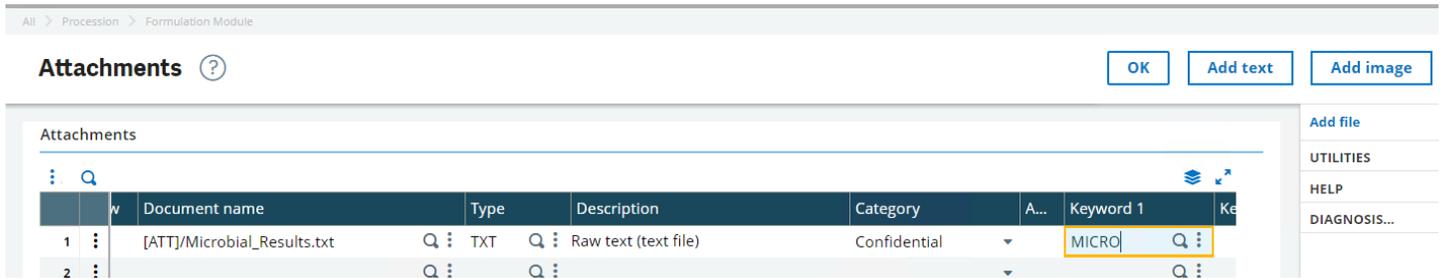
After clicking on Ok to save the attachment, the attachment checkbox will show as checked.

Technical Requirements

	Requirement ID	Description	Report	CoA	Attachment
1	COA	Certificate of Analysis	XJB2COFA_DLV	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	MICRO	Microbial Results		<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	SUPCOA	Supplier CoA		<input type="checkbox"/>	<input type="checkbox"/>
4				<input type="checkbox"/>	<input type="checkbox"/>

The attachment will be saved in the standard Sage X3 attachment feature, which is accessed from the paperclip on the right menu.





When the attachment is saved, the Keyword1 value is set to the Technical Requirement ID.

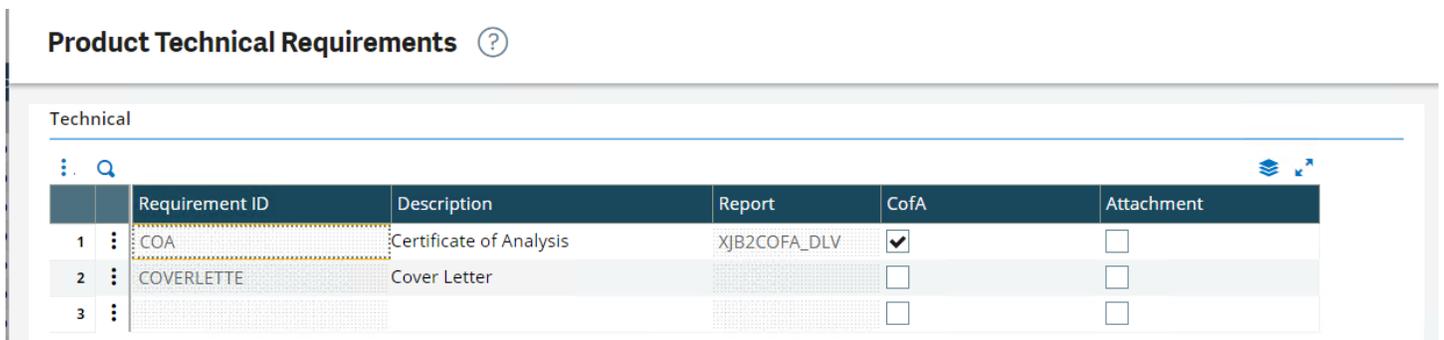
Product Technical Requirements

Technical Requirements can be viewed for a product record. Product records can be accessed from the menu option **Common Data**→**Products**→**Product**.

The Technical Requirements menu option can be found on the right panel Procession menu as shown below.



The Technical Requirements on the product are read-only. These requirements are editable on the formula record only.



Customer Technical Requirements

Technical Requirements can also be set at the Customer or Delivery Address Level. When sales orders are created, the system will add all Technical Requirements from the product and the customer. If a Technical Requirement exists in both places, then the customer values for the Technical Requirement will be used.

The customer record can be accessed from **Common data**→**BPs**→**Customer**. The Technical Requirements can be accessed from the Requirements/Settings menu option in the right panel Procession group as shown below.

PROCESSION ^

Requirements/Settings

All > Common data > BPs

Procession-Requirement/Setting

Sales documents

Regulatory Documents

Regulation ID	Description	Frequency	Langua...	Delivery address	Destination
1					

Technical Requirements

Requirement ID	Description	Report	COA	Delivery address
1	COVERLETTE	Cover Letter	ZCOVERLETTE	GA
2				

The Technical Requirements grid can be found in the center of this window. The fields in this section are the same as the Technical Requirements Master Data, with the exception of the field below.

- **Delivery Address** -used to specify that the Technical Requirement is for a specific delivery address only. If the Technical Requirement is applicable to all delivery addresses, then leave the delivery address blank.

Sales Order Technical Requirements

As line items are added to a sales order, then Technical Requirements for the product or customer are automatically added to the sales order. Technical Requirements can also be manually added to the sales order.

On the Sales Order, Technical Requirements can be found on the Delivery/Regulatory tab as shown below.

All > Procession > Distribution Enhancements > Distribution > Enhancements

Sales order ALL : Full entry Allocation Prepar

	Management	Delivery	Invoicing	Lines	Delivery/Regulatory	
3	<input type="checkbox"/>	<input type="checkbox"/>		ZNEWPRODUCT2	Paint-Low VOC Acrylic Gloss	MADEINUSA
4	<input type="checkbox"/>	<input type="checkbox"/>		ZNEWPRODUCT2	Paint-Low VOC Acrylic Gloss	NONGMO
5	<input type="checkbox"/>	<input checked="" type="checkbox"/>		ZNEWPRODUCT2	Paint-Low VOC Acrylic Gloss	SDS

Technical Requirements

	Delivered	Required	Product	Description 1	Requirement ID	Description
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ZNEWPRODUCT2	Paint-Low VOC Acrylic Gloss	COA	Certificate of Analysis
2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ZNEWPRODUCT2	Paint-Low VOC Acrylic Gloss	COVERLETTE	Cover Letter
3	<input type="checkbox"/>	<input type="checkbox"/>				

Delivery Information

The fields in this section are:

- **Delivered** – Indicates if this requirement has been met or the document has been delivered. This checkbox will be automatically updated when printing the standard Procession Certificate of Analysis on the Delivery record. For other Technical Requirements, this checkbox will need to be manually updated.
- **Required** – Normally, this would be checked for every Technical Requirement. However, if it is determined that this order is an exception, then the required checkbox can be unmarked.
- **Product** – this is the line item for which this Technical Requirement applies.
- **Requirement ID**
- **Description**
- **Language** – Defines the document’s language
- **Delivery Date** – Date the document was delivered. This field is automatically populated when printing the Procession Certificate of Analysis on the Delivery Record.
- **Source** – The source of the requirement. The options are FORMULA and CUSTOMER.

Delivery Technical Requirements

On the Delivery record, the Technical Requirements can also be found on the Delivery/Regulatory tab. This allows the shipping department to view the Technical Requirements. The delivery record can be accessed from the menu option **Sales**→**Deliveries**→**Deliveries**.

The fields in this section are identical to that of the Sales Order. The main difference is that only the “Delivered” checkbox is enabled on the Delivery record. This allows the user to mark the Technical Requirement when it is completed.

Also, when printing the CoA at Delivery report from the Delivery record (shown below), the Delivered checkbox and Delivery Date fields are automatically updated.

Selection Print codes >

Type	Code	Title
Reports	BONLIV	Packing slips
Reports	BONLIV2	Fixed footer packing slips
Reports	BONLIV2PI	Preprinted packing slips
Reports	BONLIVTTC	Tax-incl. packing slips
Reports	BONLIVTTC2	Fixed footer tax-inc pkg slips
Reports	BONLIVTTC2PI	Preprinted tax-incl. packing s
Reports	BONPRELIV	Delivery picking tickets
Reports	BONPRELIVP	Delivery pick tickets portrait
Reports	COFA	Certificate of analysis
Reports	FICLOTVCR	Document batch record
Reports	XJB1SDS_DLV	Procession- SDS on Delivery
Reports	XJB2COFA_DLV	Procession -CofA on Delivery

Appendix 1 – Local Menus

Procession uses local menus to provide standard statements, settings, and agency required responses on many screens, windows, and reports. Local menus are accessed by **selecting Development → Data and Parameters → Tables → Local menus – Messages**.

The **Procession** local menus are listed below. Only local menus that are flagged as “Changeable” on the local menu screen should be modified. When modifying a local menu, add new entries to the end of the list, instead of replacing items within the list. The reason is that Local menu values are stored in data as integers, with the integer value based upon the position of the selected item in the list. If a local menu item is deleted, the position stored for the local menu in existing data will no longer match the list. This can cause previously selected value to incorrectly change to whatever item currently resides in the same position in the local menu list.

When modifying a local menu, users will need to logout and restart their Sage X3 session before having access to the changes.

Local Menu 19158 – QC Analysis Group By

This local menu is used on the QC Statistical Analysis Report criteria for determining the Group By for the report.

The screenshot shows the configuration for Local Menu 19158. The breadcrumb path is All > Development > Data and parameters > Tables. The title is Local menus. The identifier is 19158 and the description is QC Analysis Group By. The module is Supervisor and the activity code is XJB2. The menu is marked as a local menu and is not changeable or do not translate. The list of values table is as follows:

	Nu...	C...	Message
1	:	1 1	Product+Question
2	:	2 2	Question
3	:		

Local Menu 19159 – Min/Max/All

This local menu is used on the QC Statistical Analysis Report criteria for determining which “Lot Sample” to use for the report.

Local menus

IDENTIFIER

Chapter: 19159 | Description: Min/Max/All | Local menu

CHARACTERISTICS

Module: Supervisor | Activity code: XJB2 (Procession - Quality Control) | Changeable | Do not translate

SIZE

Length: | Mini: | Maxi: |

LIST OF VALUES

	Nu...	C...	Message
1	1	1	Minimum
2	2	2	Maximum
3	3	3	All

Local Menu 19165 – Stock Transaction Type

Used on the QC Result - Quick Entry window to define the type of receipt transaction.

Local menus

IDENTIFIER

Chapter: 19165 | Description: Stock Transaction Type | Local menu

CHARACTERISTICS

Module: Supervisor | Activity code: XJB2 (Procession - Quality Control) | Changeable | Do not translate

SIZE

Length: 15 | Mini: | Maxi: |

LIST OF VALUES

6 Results Display: 25

	Nu...	C...	Message
1	1	E	Miscellaneous receipt
2	3	R	Supplier receipt
3	5	O	Work order receipt
4	12	I	Shipment return
5	28	2	Internal transfer receipt
6	90	D	R&D

Local Menu 19166 – Update QC Detail

Used on the Post QE Results feature on the QC Workbench menu to specify whether results should be posted to a single quality control detail line, or to all lines on the QC Workbench for the same product.

IDENTIFIER

Chapter 19166 Description Update QC Detail Local menu

CHARACTERISTICS

Module Supervisor Activity code → XJB2 Changeable Do not translate
Procession - Quality Control

SIZE

Length 5 Mini Maxi

LIST OF VALUES

		Nu...	C...	Message
1		1	1	Update All
2		2	2	Update Specific Line

Appendix 2 – Miscellaneous Tables

Misc Table 4846 – QC Test Methods

QC Test methods are assigned to Questions and define which methods are available for obtaining results for the question. These test methods must be defined in this miscellaneous table prior to assignment to a question.

All > Development > Data and parameters > Miscellaneous tables

↑ ↓ ↕ Miscellaneuous table

MISCELLANEOUS TABLE

Table *	Description	Dependency table
4846	Proceession QC Test Methods	

LIST OF VALUES

⋮ Q ↗

	Code	Description	Short description
1	METHOD1	Example Method 1	
2	METHOD2	Example Method 2	
3	PHHELEC	pH Hydrogen Electrode	
4	PHINDICAT	pH Indicator	
5			

Misc Table 4852 – Product Technical Sheet Types

Property types are used to define different types of Product Technical Sheets. Proceession is initially installed with the test types of FINAL and INPROCESS, but additional types can be added.

Any type that has a value of “Yes” in the FINAL column is considered a FINAL type, regardless of the code value. Only QC results entered for FINAL Product Technical sheets will show on the Certificate of Analysis.

MISCELLANEOUS TABLE

Table *	Description	Dependency table
4845	Type	

LIST OF VALUES

⋮ 🔍 ↶ ↷

	Code	Description	Short description	FINAL
1	FINAL	Final		Yes
2	INPROCESS	In Process		No
3				

Appendix 3 – User Session Timeout Settings

The following information is from Sage Knowledgebase and describes how to increase the user timeout settings for Sage EM. By default, a user session times out after 20 minutes of inactivity.

1. Have all users exit Sage EM.
2. On the Syracuse server, browse to `..\Syracuse\syracuse\bin\` and locate a file called **nodelocal.js**
3. Make a copy of the **nodelocal.js** file.
4. Once a copy has been made, right-click the **nodelocal.js** file and select **Edit** (or open it with Notepad if this option is not available).
5. Change the timeout value from **20** to the desired duration:
 - The **nodelocal.js** file will have a section similar to what's below. Edit the **20** to something higher, such as **480**. The value 20 represents 20 minutes. The 20 is two character digits. Do not exceed more than 5 character digits as doing so may cause problems with Syracuse.
 - **session: {**
 timeout: 20, // minutes
 checkInterval: 60, // seconds
 "auth": "basic"
 },
6. Save the file.
7. Restart the Syracuse service.
 - If the Syracuse service does not start or if logging into Sage X3 generates errors, this generally means the **nodelocal.js** file was edited incorrectly. Restore the copy and attempt steps in this KB again, making sure not to exceed 5 character digits in the value and no extra characters are added or deleted.

Note: The timeout is unique to each Web browser tab. If you are working on the first Web browser tab in X3, and open a second tab and continue to work on the second tab without going back to the first tab, the first Web browser tab will time out. You will not see the timeout message until you click back on the first tab.

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