2010-902a - Setting up Parameters for NCR/ECR records in the Quality Management Systems in Opto

Overview:

The following parameters must be set up and populated prior to starting data entry for NCR/ECR records in the Quality Management Systems on the QUALITY Tab on the Opto Ribbon. These Parameters are the codes and their description that you use when selecting from the pop-up menus throughout the Quality Management System Module.

NCR/ECR Parameters - The NCR = Non-Conformance Report / ECR = Engineering Change Request Parameters are the codes and description used when entering, editing, and raising issues within the Quality Management Systems.

Open the **QUALITY** Tab and **click** on the 'Data Set' to display the list.



1 - Area - To set-up the codes and descriptions - **click** on the 'Data Set' and select "Area' from the list. **Click** in the "Code" field and create a code, **press** <TAB> and enter description (See example below), **press** <F9> to save. Repeat process as necessary.

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Insp	ection/Calibratio	n	Document M	anagement	*	QA Root
C					*	QA Severity
1	QA Area				*	QA Source
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	100	Area Descript	ion		*	Document Category
	100	Auministrati	on		*	Document Type

Repeat process as necessary.



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2 - Area Sub - these codes and description work in conjunction with the Area Categories to refine the area of the issue or item. To set-up the codes and descriptions - **click** on the 'Data Set' and select "Area Sub' from the list. **Click** in the "Code" field and create a code, **press** <TAB> and enter description (See example below), select and 'Area' Code associated with the area sub if required and **press** <F9> to save.

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	Code	Area Descri	intion		÷.	Document Type	
	100 -	Administr	ation				

Repeat process as necessary.

🖸 QA Area	i Sub		
Code	Area Sub Description		
100-1	 Non Conformance 		
QA Area	Sub		
Code	Description	Pare	Parent Description
100-1	Non Conformance		
100-2	Likely	100	Administration
100-3	Moderate	100	Administration
100-4	Unlikely	100	Administration
101-1	Management Accountability	101	Workplace Health & Safety
101-2	Quality Control	101	Workplace Health & Safety
101-3	Communication and Information	101	Workplace Health & Safety
102-1	Below Standard Finish	102	Quality Control
201-1	Programming	201	Design and Development
201-2	Drafting and Design	201	Design and Development
301-1	Fabrication	301	Manufacturing
301-2	Machining	301	Manufacturing
301-3	Welding	301	Manufacturing
	Paint - Polish	301	Manufacturing



3 - QA Root - This is the fundamental cause or source from which the issue or item originated. To set-up the codes and descriptions - **click** on the 'Data Set' and select "QA Root' from the list. **Click** in the "Code" field and create a code, **press** <TAB> and enter description and **press** <F9> to save.



Repeat process as necessary.

💷 QA Ro	oot 🗖 🖾
Code 1	Root Description Man
🗢 QA Ro	ot 💽
Code	Description
1	Man
2	Machine
3	Method
4	Material
5	Environment
PROD	Production
<u> </u>	<u>QK</u> <u>C</u> ancel <u>S</u> earch <u>P</u> rint

4 - QA Severity - this is the extent to which the issue or item is deficient. To set-up the codes and descriptions - **click** on the 'Data Set' and select "QA Severity' from the list. **Click** in the "Code" field and create a code, **press** <TAB> and enter description and **press** <F9> to save.

PURCHASING O	RDERS	JOBS/SCHEDULING	INVOICING	QUAL	ITY MANAGEMENT
Rew Insp/C	al p/Cal	Documents	📷 New Document 📷 Change Request	₩ ₩ ₩	Jata Set ↓ Area Area Sub
OA Severity		Document M		₩	QA Root QA Severity
Code Se	everity De Major	escription		* * *	QA Source Insp/Cal Type Document Category

Repeat process as necessary.



🔜 Q4	A Sever	ity		
Code 1	2	Severity Descript Major	tion	
👁 Q4	A Sever	ity		x
	Code		Description	
1	1	Major		
2	2	Minor		Cancel
3	3	Moderate		

4. QA Source - these are the origin through which something has come into being or from which it has been obtained. To set-up the codes and descriptions - **click** on the 'Data Set' and select "QA Source' from the list. **Click** in the "Code" field and create a code, **press** <TAB> and enter description and **press** <F9> to save.

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	Documents			Area Sub
ection/Calibration	Document Mar	nagement	\$	QA Root
QA Source		- • •	*	QA Severity
	·		\$	QA Source
Code Source De	Code Source Description			Insp/Cal Type
1 Custom		*	Document Category	
-			*	Document Type

Repeat process as necessary.

🔳 QA S	ource 🗖 🗖 🔀
Code 1	Source Description Customer Complaints
🗢 QA So	urce
Code	Description
1	Customer Complaints
2	Internal Issue
3	Supplier Issue
4	Client Request
	<u>Q</u> K <u>C</u> ancel <u>S</u> earch <u>P</u> rint

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Inspection Parameters

The Inspection Parameters are the codes and their descriptions the USER will selected from the popup lists when they create or edit an Inspection or Calibration Request within the QUALITY Tab.

1 - **Inspection Type** - this code is used to describe the type of investigation required for a piece of equipment or tool. To set-up the codes and descriptions - **click** on the 'Data Set' and select "Insp/Cal Type' from the list. **Click** in the "Code" field and create a code, **press** <TAB> and enter description and **press** <F9> to save.

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ction	/Calibration		Document M	anagement	.	QA Root
	💷 Inspecti	on Type		- • •	*	QA Severity
					*	QA Source
	Code	Descripti	on		*	Insp/Cal Type
	1 👻 Calibration Internal				*	Document Category
					*	Document Type

Repeat process as necessary.

	Inspection Type								
0	Code Description								
	1 Calibration Internal								
0	Inspection Type								
	Code	Description							
	1	Calibration Internal							
	2	Calibration External							
	3	Non-Destructive Test							
	4	Visual							
	5	Compliance (WH&S)							
0	<u>0</u> K	<u>C</u> ancel <u>S</u> earch <u>P</u> rint							



Document Parameters

The Document Parameters are the codes and descriptions used to describe the documentation stored within the QUALITY Tab.

To access the Document Parameters - the **QUALITY** Tab and **click** on 'Data Set' to display the menu and then **click** on 'Document Category'.

1 - Document Category - To set-up the codes and descriptions - click on the 'Data Set' and select "Insp/Cal Type' from the list. **Click** in the "Code" field and create a code (Example, FC = Flow Chart), **press** <TAB> and enter description then **press** <TAB> to continue to the "Doc ID No" field and enter a starting number for those type of documents and **press** <F9> to save.



Repeat process as necessary for each of the document categories.

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Code:	Category Description:	Doc	ID No:				
🗢 Document Category 📃 💌							
Code	Description	Last No	<u>o</u> k				
Code FC	Description Flow Chart	Last No 1001	<u>o</u> k				
Code FC FO	Description Flow Chart Forms	Last No 1001 2001	OK Cancel				
Code FC FO OP	Description Flow Chart Forms Operating Procedures	Last No 1001 2001 3001	<u>O</u> K <u>C</u> ancel				
Code FC FO OP PD	Description Flow Chart Forms Operating Procedures Position Description	Last No 1001 2001 3001 4001	<u>O</u> K Cancel				
Code FC FO OP PD PP	Description Flow Chart Forms Operating Procedures Position Description Policy Procedures	Last No 1001 2001 3001 4001 5001	<u>O</u> K Cancel				
Code FC FO OP PD PP QM	Description Flow Chart Forms Operating Procedures Position Description Policy Procedures Quality Manual	Last No 1001 2001 3001 4001 5001 6001	<u>O</u> K <u>C</u> ancel				
Code FC FO OP PD PP QM WH&S	Description Flow Chart Forms Operating Procedures Position Description Policy Procedures Quality Manual Workplace Health & Safety	Last No 1001 2001 3001 4001 5001 6001 7001	<u>O</u> K <u>C</u> ancel				



2 - **Document Type** – To set-up the codes and descriptions - **click** on the 'Data Set' and select "Insp/Cal Type' from the list. **Click** in the "Code" field and create a code (Example, *DOC* = *Document*), **press** <TAB> and enter description then **press** <TAB> to continue to the "Doc ID No" field and enter a starting number for those type of documents and **press** <F9> to save.

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	🔎 New In 🎾 Perforn	sp/Cal n Insp/Cal	Documents	📷 New Document 📷 Change Request	₩ \$	Data Set Area Area S	• ub
ecti	on/Calibration		Document M	anagement	-	QA Ro	ot
ſ	Documen	t Type			*	QA Sev	verity
					*	QA So	urce
	Code:	Description	:		*	Insp/C	al Type
	DOC 🗸	Documen	t		*	Docun	nent Category
l					*	Docun	nent Type

Repeat process as necessary for the different nature of the documents.

🗈 Document Type 📃 🖼				
Code: DOC 🔻	Description: Document			
👁 Document Type 💽				
Code DOC REC	Document Record	Description		<u>QK</u> Cancel

