

Documents for the Quality Function are Not Just Reports

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When Printed Output is More than a Report

A frequent question from customers during the investigation of acquiring new software is always “What about reports?”

The great news is that when working with Microsoft Dynamics branded products the reporting options are legion. There is a range of tools from Report Writer, to SQL Reporting Services, to Microsoft Word templates, to the newly delivered Power BI tools. We are always very confident that the user will have more than adequate access to their data in the form of reports and inquiries.

However, we need to recognize that this question isn't always about reporting. Sometimes the question is really about the generation of business documents. The user is really asking “Will I be able to easily build or generate the documents needed specifically by my business?”

In the quality control function Item Specifications, Certificates of Analysis, and Certificates of Compliance are three such named business documents that are often initially dismissed as simple reporting. But, just like a check or an invoice that is used to authorize or confirm specific actions these quality documents need to be generated and controlled in a scalable manner. We need to ensure that the generation of these customer mandated quality documents does not drag down or delay our customer service commitments. This is why when selecting a quality management software solution we have to be sure it provides tools that fulfill the data needs of these documents.

Generating Certificates of Analysis and Compliance

A Certificate of Analysis or Certificate of Compliance reports the results of recorded tests and inspections and compares these results to the product specifications. Each customer receiving such a certificate may have very distinct requirements about the content of the certificate. The customer may also have specifications related to the layout of the content. This combination of variability for the document must be accommodated in the processes used to generate the document.

Quality Essentials Suite provides these accommodations with several distinct functions that support the process of generating a certificate. These are:

- User Defined Fields
- Certificate Templates
- Certificate Layouts



User defined fields are provided as part of the Certificate of Analysis (COA) print form. The user is permitted to define the data type and label of up to 12 fields found in the header function of the COA report. This functionality provides the flexibility to include in the printed COA content any data that is specifically required by customers but that might not be part of your traditional operating data. Examples of such content might be Rail Car ID, or origination numbers.

Certificate Templates are records created on a per-item basis using the COA Template form. They allow the user to define the results that will be supplied in each COA. The user will select from the available inspection and test records the specific test results that they want to include on a COA that is generated using that template. This aspect of the process focuses on ensuring the correct result data in the correct sequence is applied to the business document.

Certificate Layouts are developed using the report designer tool that is supplied with the software. We provide several generic reports for the collection and presentation of COA data. These default layouts have built-in behaviors to calculate averages and/or evaluate data in a range to locate the highest and lowest values. These default layouts may be copied, modified, and then renamed to create an unlimited variation of COA layouts. When executing the COA print process, the user selects one of these named layouts from a drop-down list.

Similar tools and functions are provided in the software to support generation of item specification reports. Our

Item Specification report generation form provides broad capability to include or exclude content and our report designer tool provides for the creation of unlimited layouts of the desired content.

Closing the Loop Means Generating Documents On-Time

The process of defining product specifications, and then managing, evaluating, and confirming that the specifications are met is a mandatory requirement in many industries. When left to manual or paper-based systems for control and delivery of these proofs, the risks of non-performance can be significant.

The capability to automate and manage these functions ensures there is complete support for this closed loop process of confirming item specifications are met during the production process. The availability of the solution as a concurrent multi-user access tool ensures that generation of required documents to support the business processes can scale efficiently and accurately as the business grows.

To better understand how robustly the software supports these challenging requirements for custom and targeted documentation, we suggest you visit our web site, www.qualityessentialssuite.com or contact us to request a demonstration of the software capability targeted to your needs. 