

# Guidelines: Activating Source Inspection for Externally Procured Parts



## Applies to:

SAP R/3

SAP Material Management and Quality Management : Activating Model inspection for a goods receipt for a purchase order to perform Source Inspection.

## Summary

This Article demonstrates the configuration settings and master data set up required to activate the source inspection. This requires generating an inspection lot prior to goods receipt of the Purchase order to perform inspection at the Vendor location and evaluate the quality of the product and Manufacturing and Quality Control process of the Vendor.

This article explains about

- Configuration settings required to activate the 0101 Inspection type(Model inspection for a goods receipt for a purchase order)
- Master Data setup required for 0101 Inspection type
- Step by Step procedure on how to perform 0101 inspection transactions in sequence.
- Significance of Quality Info records and different options available in Quality Info records
- Significance of QM control key in Material master to control certain functions based on Source Inspection

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## Author Bio

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## Introduction to Source Inspection

A Source Inspection is an Inspection type which can be used to and evaluate the quality of the product and Manufacturing and Quality Control process of the Vendor prior to receiving of the Materials in Purchase orders. This information can also be used for vendor evaluation.

A source inspection can be performed either by the receiver of the service alone or in the presence of the vendor or by a Third party surveyor appointed by him.

Source Inspection Usage decision can be used as sub criteria for Vendor Evaluation.

## Configuration Settings

### Maintain QM Control Key

Maintain the QM Control Key which need to be assigned the QM view of Material Master

**Note:** Maintaining QM control key is required only if QM in Procurement key is activated in Material Master and would like to control certain functions based on the Source inspection lot.

**Menu Path:** SPRO --> Quality Management --> QM in Logistics --> QM in Procurement --> Define Control Keys

### Change View "Control key for QM in Procurement": Details

Description of control key	
QM control key	0005
Short text	Delivery release, certificate
Document control	
<input type="checkbox"/> Tech.del. terms	
<input type="checkbox"/> Q-agr. reqd.	
QM Control in Procurement	
<input checked="" type="checkbox"/> Release required	
<input checked="" type="checkbox"/> Cert required	
<input type="checkbox"/> Block inactive	
<input type="checkbox"/> Block invoice	
Message control for lock	
Message mode	Warning
GR/Source inspection control	
GR for rejection	Create new inspection lot
GR control/Batch	Create new inspection lot

Master Data Setup

### Step 1: Activate 0101 Inspection type in Material Master

Activate QM Proc. Key and enter QM control key '0001' and Certificate type E21 and maintain the Parameters for 0101 Inspection as shown below

**Change Material 655040-10 (Raw Material (ZROH))**

Additional data | Organizational levels | Check screen data

Plant data / stor. 2 | Quality management | Accounting 1 | Accounting 2

Material: 655040-10 | Test Material  
 Plant: 3010 | Intuitive Surgical

**General data**

Base Unit of Measure: EA each |  Inspection setup | Insp. setup  
 Unit of issue:   
 QM material auth.:   
 GR processing time:  days  
 Catalog profile:   
 Plant-sp.matl status:

**Procurement data**

QM proc. active | Delivery release:   
 QM control key: 0005 | Cert. of conform.:   
 Certificate type: E21  
 Target QM system:   
 Tech. delivery terms

**Plant 3010 Material 655040-10 : Inspection Setup Data**

Se...	InspType	Short text	PreferredInsTyp	Active	Ins
<input checked="" type="checkbox"/>	01	Goods receipt insp. for purchase order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	€
<input type="checkbox"/>	0101	Model inspection at GR for purch. order	<input type="checkbox"/>	<input checked="" type="checkbox"/>	€

Inspection type: 01 Goods receipt insp. for purchase order

**Detailed information on inspection type**

Post to insp. stock | Smpl.procedure:  |  Serial numbers poss.  
 Insp. for HU |  100% inspection | Avg. insp. duration:   
 Insp. with mat spec. | Inspection %:  | Q-score procedure: From usage decl...  
 Insp. with task list |  Manual sample calc. | Allowed scrap share:   
 Insp. by configuratn |  Manual sample entry | Control insLot: For each materia...  
 Dyn. mod. rule:  |  Individual QM order  
 Automatic assignment |  Skips allowed | QM order:   
 Check Chars |  Automatic UD

Inspection types | Insp.type

## Step 2: Maintain Quality Info Record for the Material and the Source of Supply

**Path:** Logistics > Quality Management > Quality Planning > Quality Info Record: Procurement (QI01)

### Create Q-Info Record

Material	655040-10	
Revision level		
Vendor	101843	
Plant	3010	

Copy model		
Material		
Revision level		
Vendor		
Plant		

### Create Q-Info Record

Admin. data...	Status	Status management	Change documents	Purchasing info record
Material	655040-10	Test Material		
Revision level				
Vendor	101843	1000 CORPORATION		
Plant	3010	Intuitive Surgical		
<input type="checkbox"/> Deletion flag				

<b>Release</b>	Insp. control	Status	Quality agreement
----------------	---------------	--------	-------------------

Release date	
Release until	12/20/2011

Release quantity	
<input checked="" type="checkbox"/> Release qty. active	
Release quantity	1,000
Unit of measure	EA
Ordered quantity	0
Reset on	

Block	
Block function	
Block reason	
Vendor block	

With above parameters, this Source is set to be valid for this material until 12/20/2011 or till the sum of orders quantities reaches 1000 whichever is earlier.

## Create Q-Info Record

Admin. data...	Status	Status management	Change documents	Purchasing info record
Material	655040-10	Test Material		
Revision level				
Vendor	101843	1000 CORPORATION		
Plant	3010	Intuitive Surgical		
<input type="checkbox"/> Deletion flag				

[Release](#)
[Insp. control](#)
[Status](#)
[Quality agreement](#)

**Certification**

Existing QM sys.  Valid to

Vendor's QM sys.  Valid to

Insp. control

**Vendor source inspection**

Source inspection  Model inspection at GR for purch. order

Lead time (in days)   Source insp.- no GR

**Certificate control**

Certificate

In "Insp. Control" tab, Source Inspection is selected as '0101' Inspection type, Lead time is set as '10' days and Source insp.-no GR is activated so that system will not create any inspection lots at goods receipt for purchase order items that have undergone a source inspection.

Admin. data...	Status	Status management	Change documents	Purchasing info record
Material	655040-10	Test Material		
Revision level				
Vendor	101843	1000 CORPORATION		
Plant	3010	Intuitive Surgical		
<input type="checkbox"/> Deletion flag				

[Release](#)
[Insp. control](#)
[Status](#)
[Quality agreement](#)

**Status management**

Status profile

Status reached

With insp. lot

Desired

With insp. lot

Further stats.

We need to create a status profile before we assign it to the Quality Info Record

## Transaction: BS02

### Change Status Profile: User Status

Object Types

Status profile: **QM\_P\_D0L** Supply Relationship Profile 1  
 Maintenance Language: **EN** English

Stat...	Status	Short Text	Long...	Init. st...	Lowest...	Highest...	Positi...	Priority	Auth. code
	0000	Sample	<input type="checkbox"/>	<input checked="" type="checkbox"/>					
1	0001	Supply Relationship Initia...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	5	1	1	
2	0002	Qualification Model	<input type="checkbox"/>	<input type="checkbox"/>	2	3	1	1	
3	0003	Pilot Series	<input type="checkbox"/>	<input type="checkbox"/>	2	4	1	1	
4	0004	Series	<input type="checkbox"/>	<input type="checkbox"/>	1	4	1	1	
5	0005	Requalific. Model Reques...	<input type="checkbox"/>	<input type="checkbox"/>	1	6	1	1	
6	0006	Requalification Model	<input type="checkbox"/>	<input type="checkbox"/>	6	7	1	1	
7	0007	Series	<input type="checkbox"/>	<input type="checkbox"/>	5	7	1	1	

In the status profile, you can specify that the delivery of a material from a vendor must pass through a number of statuses, for example:

- Model series
- Preliminary series
- Regular delivery

You can assign different inspection types (with corresponding task list usages) to a status. The system then selects the appropriate inspection types and inspection plans based on the status of the supply relationship.

### New Entries: Overview of Added Entries

New Entries

Assignment of User Status (Supply Rel.) to Insp. Type

StatPrfle	Next status	Short text	Origin	Insp. type
QM_P_D0L	0001	Supply Relationship Initiated		
QM_P_D0L	0002	Qualification Model	01	0101
QM_P_D0L	0003	Pilot Series	01	01
QM_P_D0L	0004	Series		
QM_P_D0L	0005	Requalific. Model Requested		
QM_P_D0L	0006	Requalification Model	01	0101
QM_P_D0L	0007	Series		
QM_P_D0L				

### Step 3: Create a Quality Plan for the Material

**Path:** Logistics > Quality Management > Quality Planning > Inspection Planning > Quality Plan > Create (QP01)

#### Create Inspection Plan: Initial Screen

Material   
 Plant    
 Group

**Validity**

Change Number   
 Key date   
 Revision level

**Additional data**

Profile

Click on Operation tab to maintain the Inspection operations.

#### Create Inspection Plan: Header Details

Material 655040-09      CFG,RAC-09:F02

**Task list**

Group   
 Group Counter       Test Group Counter   
 Plant        Long text exists

**General data**

Deletion flag  
 Usage  Goods receipt model  
 Status  Released (general)  
 Planner group   
 Planning work center   
 CAPP order   
 From Lot Size  To lot size    
 Old task list no.

Click on Inspection characteristics tab to maintain the Inspection characteristics.



### Inspection Plan Create: Operation Overview

Material 655040-09    CFG,RAC-09:F02    Grp.Count1  
 Sequence 0

Op...	SOp	Work cen...	Plnt	Control key	Standard...	Description	Lo...	PRT	Cl...	O...
0010			3010	QM01		Test result Recording for Model Inspecti	<input type="checkbox"/>	<input type="checkbox"/>		
0020			3010				<input type="checkbox"/>	<input type="checkbox"/>		

**Note:** We can either create Master Inspection characteristics or enter this here or we can inspection characteristics specific to this Quality Plan

### Create Inspection Plan: Characteristic Overview

Material 655040-09    CFG,RAC-09:F02    Grp.Count1  
 Activity 0010 Test result Recording for Model Inspecti

Quan. Data    Catalogs    Sample    Control Indicators

Char.	Preset i...	Qn	Ql	Master insp.charac.	Plant	Version	R...	Short text insp.char	Lon...	Tol...	Dep...	Method	Ins...	Version	Sampling procedure	Sa...	Base s...
10		<input type="checkbox"/>	<input checked="" type="checkbox"/>					Inspect Vendor Manufacturing Process	<input type="checkbox"/>		<input type="checkbox"/>				INT00002	EA	1.00
20		<input type="checkbox"/>	<input checked="" type="checkbox"/>					Inspect Vendor Quality Control Process	<input type="checkbox"/>		<input type="checkbox"/>				INT00002	EA	1.00
30		<input type="checkbox"/>	<input type="checkbox"/>		3010				<input type="checkbox"/>		<input type="checkbox"/>					EA	1.00

## Process Steps

### Step 1: Creation of Purchase Order

Transaction: ME21N

A Purchase order is created for the Material and Vendor for which we created Quality Info record in previous step.

Purchase Order Edit Goto Environment System Help

Document Overview On Print Preview Messages Personal Setting

Standard PO Vendor 101843 Doc. date 12/21/2010

Delivery/Invoice Texts Address Communication Partners Additional Data **Org. Data** Status

Purch. Org. 1000 IDES Deutschland  
Purch. Group 006 Sommer,St.  
Company Code 1000 IDES AG

S	Itm	A	I	Material	Short Text	PO Quantity	OUn	C	Deliv. Date	Net Price	Curr.	Per	OPU	Matl Group	Plnt
				655040-10	Test Material	10	ea		01/04/2011	50	USD		EA		3010

Standard PO created under the number 4500031781

## Step 2: Creating the Source Inspection Lot

Transaction: QI07

Delivery date can be entered approximately, system will pull all the open purchase orders for the material whose delivery date is on or before the date entered in this field.

### Worklist of Source Inspections

My default

Vendor: 101843 to [ ]

Material: 655040-10 to [ ]

Plant: 3010 to [ ]


Delivery date: 12/31/2010

Opening period (D): [ ]

Inspect w/o batch

Layout: [ ]


The output displays the list of open Purchase orders for the Material, Vendor and falls within the delivery date entered in selection screen.



Select the Purchase order line for which you want to create a Source Inspection lot and click on .

Inspection Lot will be created when we click on .



### Worklist of Source Inspections

 Document Q-info record

Exce...	Purch.Doc.	Item	Sc...	Material	Plant	OUh	Delivery date	Sched.qty.	Batch	GR qty	BMR	Description	Vendor	POrg
	4500031783	10	1	655040-10	3010	EA	12/28/2010	4	M101001014	0	X	Test Material	101843	9000
	4500031784	10	1	655040-10	3010	EA	12/28/2010	4	M101001013	0	X	Test Material	101843	9000

### Step 3: Result Recording

Transaction: QA33 & QE01

Execute QA33 with parameters entered as below

#### Inspection Lot Selection

My default

**Inspection lot selection**

Selection Profile	<input type="text"/>					
Lot created on	12/14/2010	to	12/21/2010			↔
Insp. start date	<input type="text"/>	to	<input type="text"/>			↔
End of Inspection	<input type="text"/>	to	<input type="text"/>			↔
Plant	3010	to	<input type="text"/>			↔
Insp. lot origin	01	to	<input type="text"/>			↔
Material	655040-10	to	<input type="text"/>			↔
Batch	<input type="text"/>	to	<input type="text"/>			↔
Vendor	<input type="text"/>	to	<input type="text"/>			↔
Manufacturer	<input type="text"/>	to	<input type="text"/>			↔
Customer	<input type="text"/>	to	<input type="text"/>			↔
Material class	Class selection					
Maximum No. of Hits	100					

**List settings**

Select all inspection lots  
 Select only inspection lots without a usage decision  
 Select only inspection lots with a usage decision

Layout: 1STANDARD

Ref. field monitor: Degree of proc. for insp. lot

Select the Inspection lot for which you would like to do result recording and click on Results

List Edit Goto Settings System Help

Search

#### Change data for inspection lot: Worklist for Inspection Lots

Usage decision (UD) Defects Defects Results Inspection lot

Moni...	A	Inspection Lot	Material	Plant	Lot size	BUh	L...	S...	Start date	End Date	System Status
		10000288553	655040-10	3010	5	EA	0	2	12/21/2010	12/21/2010	REL CALC
		10000288554	655040-10	3010	5	EA	0	2	12/21/2010	12/21/2010	REL CALC
		10000288555	655040-10	3010	4	EA	0	2	12/21/2010	12/21/2010	REL CALC
		10000288556	655040-10	3010	4	EA	0	2	12/21/2010	12/21/2010	REL CALC

Record Results and close the Inspection Characteristics and save

Results Edit Goto Extras Settings Environment System Help

**Record Results: Characteristic Overview**

Defects... Insp. method Control chart Histogram Run values (run chart) Results histor

Material 655040-10 Test Material Batch M101001012

Insp. Lot 10000288553

Activity 0010 Test result Recording for Model Inspecti PInt 3010

General Summarized Unit to be inspected Indicators

Force Further details...

Accept	Reject	S...	Short text for the inspection charac.	Specifications	Inspect	Inspected	Si...	Result
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Inspect Vendor Manufacturing Process	A / R	5	0	A	Accept
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Inspect Vendor Quality Control Process	A / R	5	0	A	Accept

### Step 4: Usage Decision

Transaction: QA33 & QA11

**Record Usage Decision: Characteristic Overview**

Defects ... Inspection lot Results history... Defective quantity... Administrative data...

Inspection Lot: 10000288553  
 Material: 655040-10 Test Material  
 Batch: M101001012  
 System Status: UD ICCO UserStatus  
 Insp. End Date: 12/21/2010

Defects Characteristics

Chars relevant for usage d... Share of scrap 0 ppm

Ch...	Va...	LT...	Weighting	Defect cl...	Specifications	Result	Short text for the inspe...	Non...	Share...

Usage decision

Code valuation: Accepted (r) ShLife Exp.Date  
 UD code: A 01 Accept  
 Quality score: 100 From usage decision code  
 FollowUpActn: MANUAL Trigger Follow-Up Actions Manually

## Step 5: Goods Receipt against PO

Transaction: MIGO

Perform the Goods receipt on the Purchase order for which we created Source Inspection lot in previous step.

Stock is directly posted to Un-restricted stock and no Inpseciton lot is generated though we have activated '01' Inspection in the Material Master.

**Display Material Document 5000379381 - Manjunatha Neelammagari**

Show Overview | Hold | Check | Post | Help

Display | Material Document | 5000379381 | 2010

General | Vendor | Doc. info

Document Date: 12/21/2010 | Delivery Note: 35531 | Vendor: 1000 CORPORATION  
 Posting Date: 12/21/2010 | Bill of Lading: | HeadText: test  
 Individual Slip | GR/GI Slip No.:

Line	Material ShortText	Qty in UnE	EUn	Deliv.date	Busi.	Stor.Loc	Batch	Purchase order
1	Test Material	5	EA	12/28/2010	4900	Super Market	M101001012	4500031780

Material | Quantity | Where | Purchase Order Data | Partner | Batch | Account Assignment

Movement Type: GR goods receipt | 101 | + Stock type: Unrestricted use  
 Plant: Intuitive Surgical | 3010  
 Storage location: Super Market | SMKT  
 Unloading Point:

**Conclusion:** Source Inspection can be used to and evaluate the quality of the product and Manufacturing and Quality Control process of the Vendor prior to receiving of the Materials in Purchase orders. This information can also be used for vendor evaluation.

We can configure Control Keys and assign it in Material Master to control certain functions like creation of new inspection lot or restricting Goods receipt based on usage decision of source inspection lot. We can also assign status profile in Quality Info records to release a vendor for a material

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