

Last Updated 8/11/2014  
Last Reviewed 5/24/2022




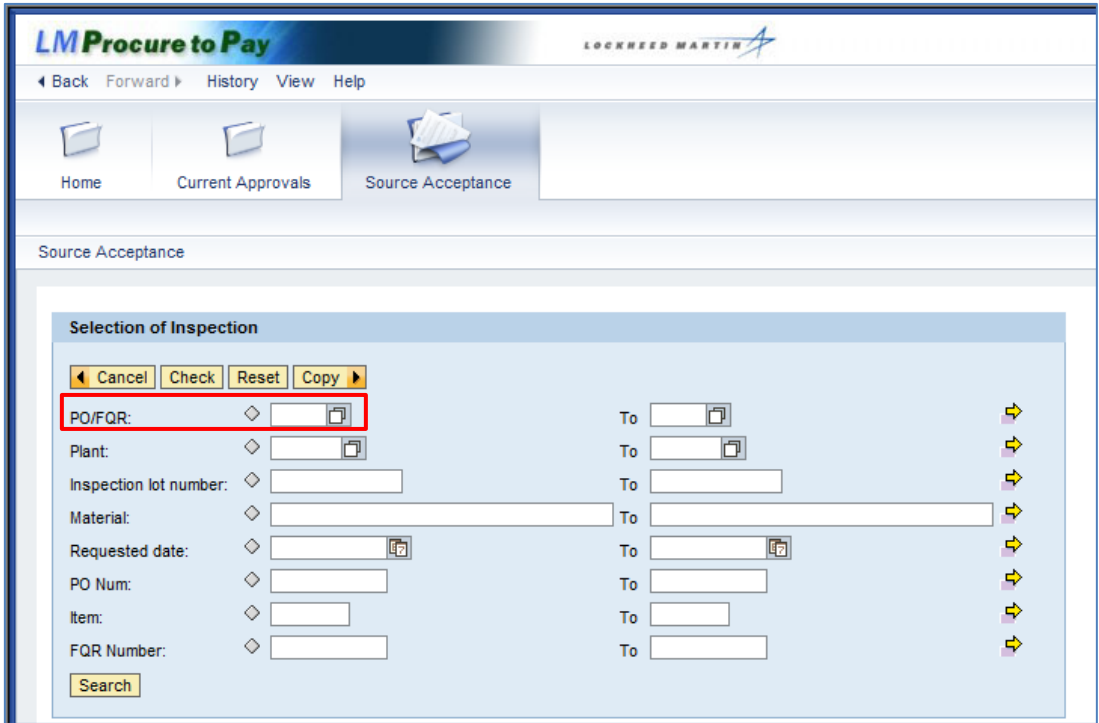
***LM Procure to Pay***  
Quick Reference Guide  
For External Source Quality  
Field Engineers  
*PO Source Acceptance*

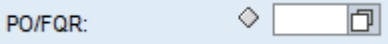
## Procedure

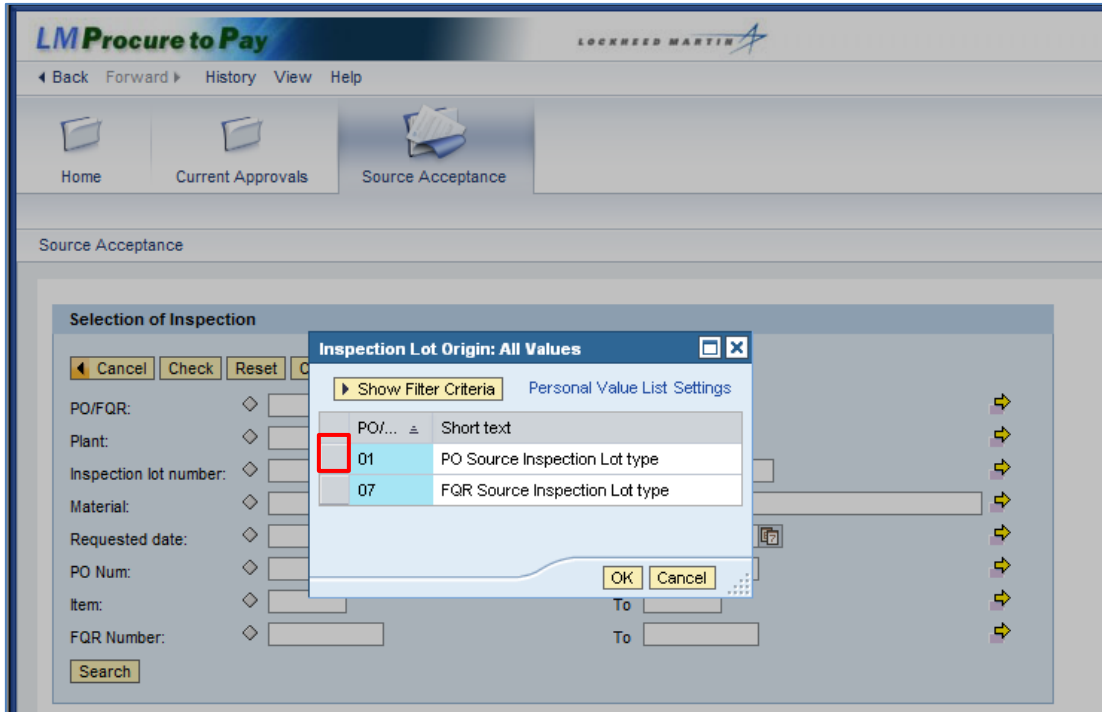
This quick reference guide displays the procedure to process a Purchase Order Source Acceptance.



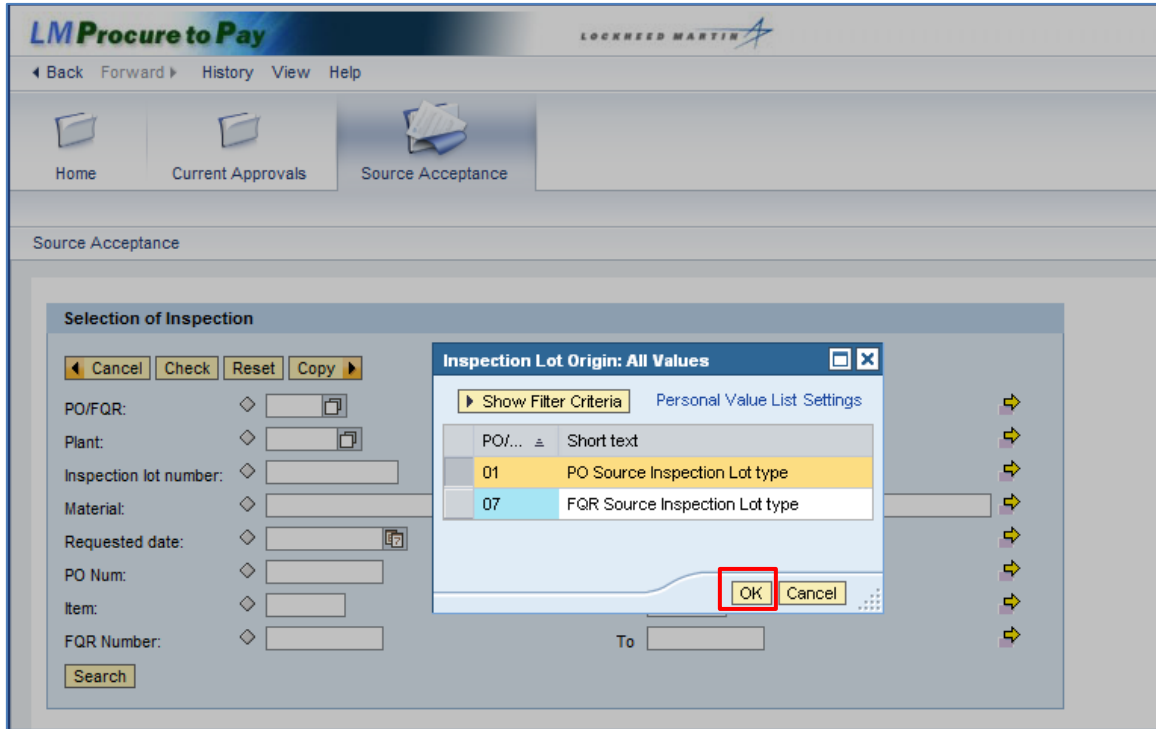
<i>Step</i>	<i>Action</i>
1.	Click the <b>Source Acceptance</b> tab to process a <u>PO</u> source acceptance. 



<i>Step</i>	<i>Action</i>
2.	<p>The <i>Source Acceptance</i> screen displays a variety of search criteria that can be used to query inspection lots.</p> <p>Click the <b>PO/FQR</b> matchcode button.</p> 

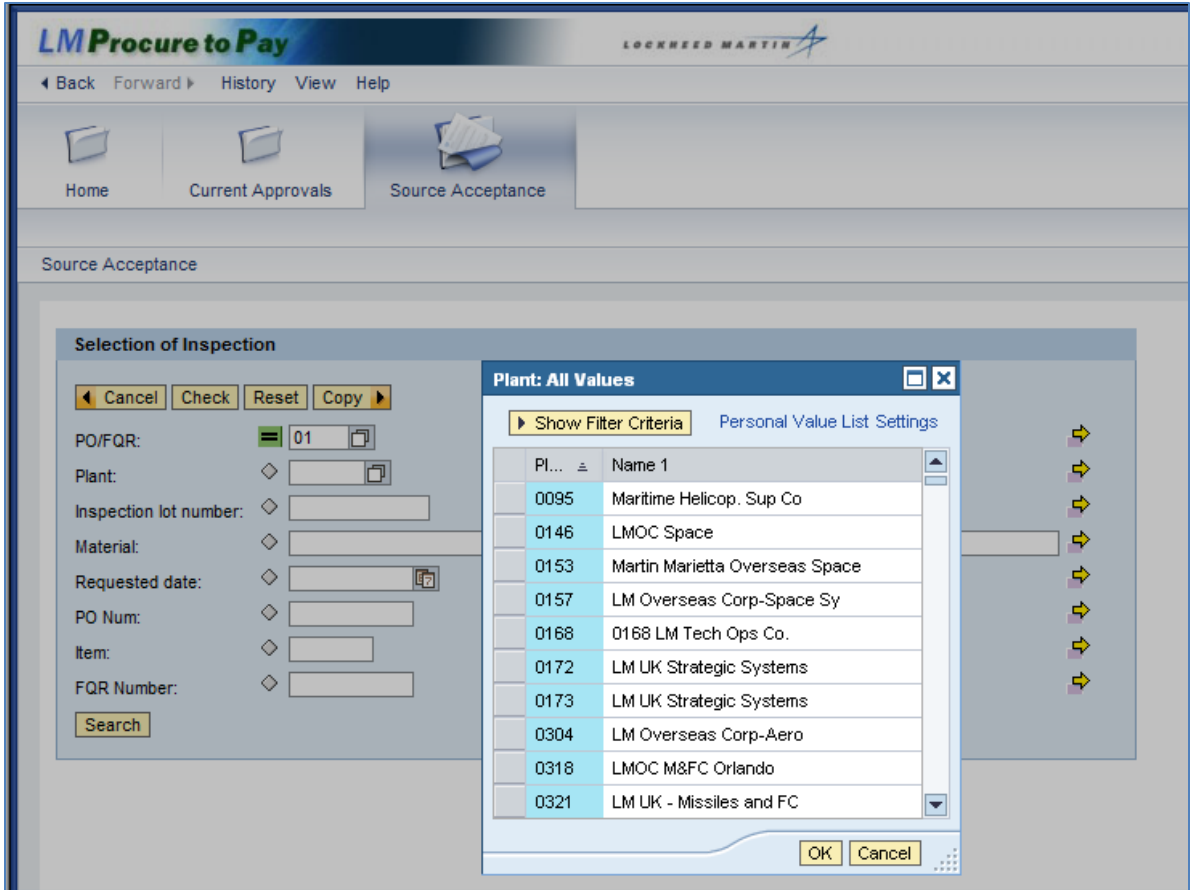


<i>Step</i>	<i>Action</i>
3.	Select the inspection lot origin by clicking the <b>PO Source Inspection Lot type</b> selection box. <div data-bbox="423 1140 816 1171" style="border: 1px solid black; padding: 2px; margin-top: 5px;"> <span style="background-color: #e0e0e0; padding: 2px;">01</span> PO Source Inspection Lot type                 </div>

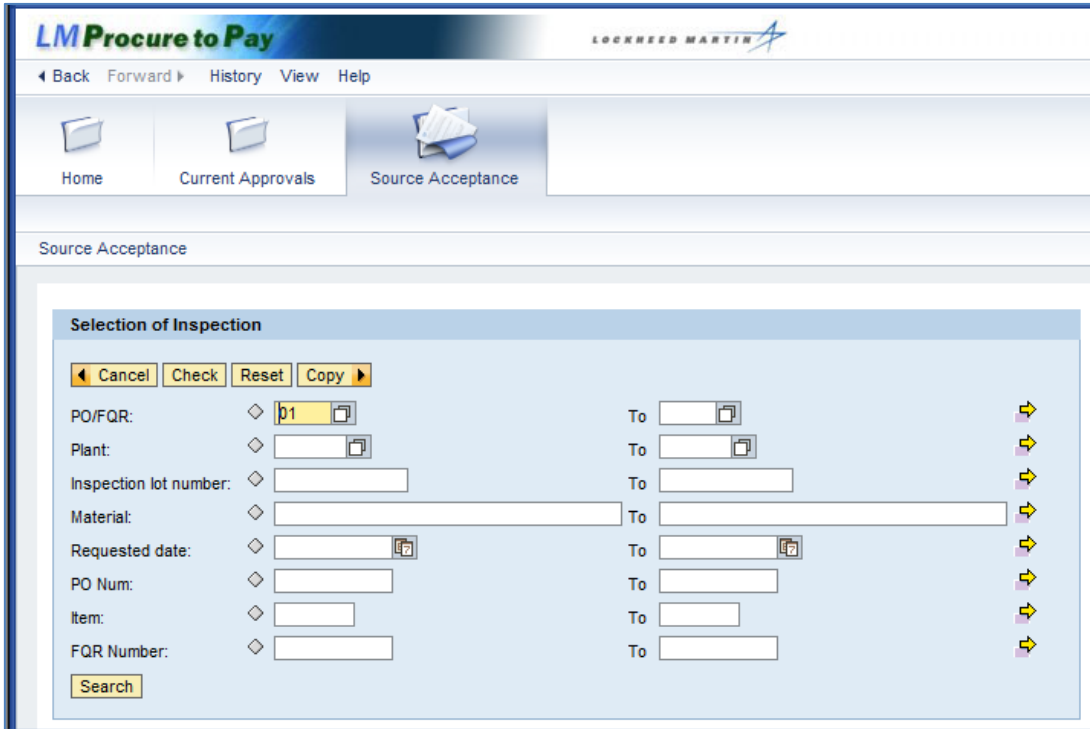


<i>Step</i>	<i>Action</i>
4.	Click the <b>OK</b> button to confirm your selection. <input data-bbox="423 1129 472 1155" type="button" value="OK"/>


<i>Step</i>	<i>Action</i>
5.	Click the <b>Plant</b> matchcode button. Plant: <input type="text"/>

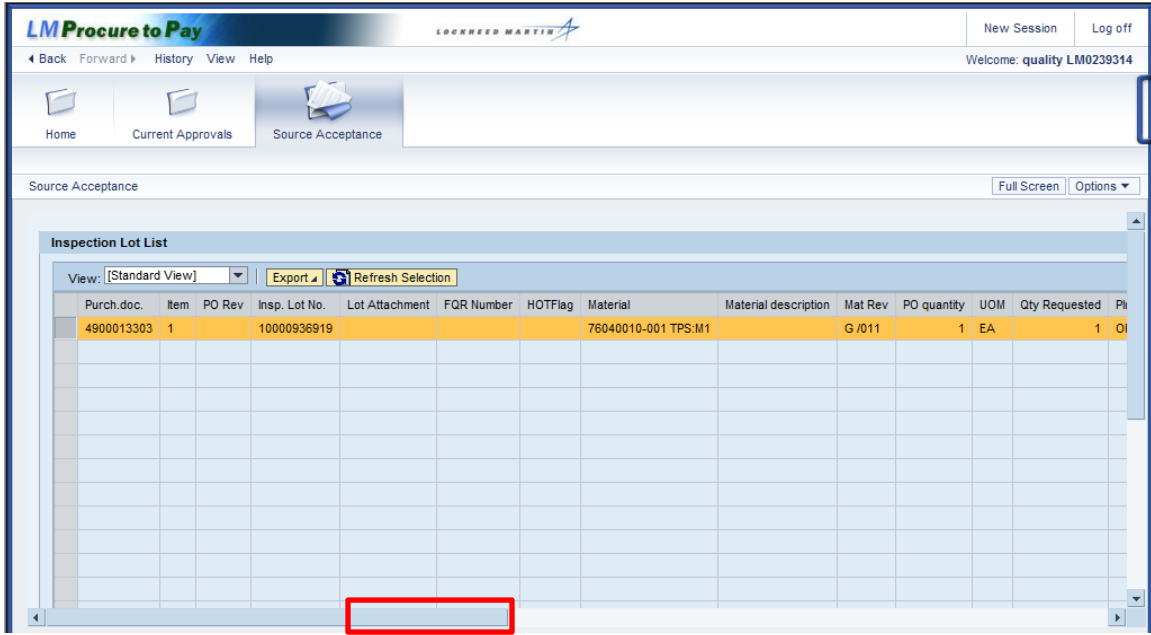


<i>Step</i>	<i>Action</i>
6.	In the <i>Plant</i> pop-up window you can select the plant where the source inspection will take place.
7.	<p>You can also search using the inspection lot number and material. For the <b>Material</b> field, enter a material (part) number and find all matching PO line items.</p> <p><b>Note:</b> Exact material matches require an asterisk (*) as the <u>last</u> character because each material has a plant identifier. For example, RG123345-3 is listed as RG123345-3:MO, and "MO" identify the Moorestown plant.</p> <p>Wildcard searches are used to query a range of materials. Enter an asterisk (*) for a range or a plus (+) for individual characters. For example, enter RNC55* to find materials beginning with RNC55 or enter RN+55 to find all materials beginning with "RN" that have any character in the 3rd position and "55" in the 4th and 5th position. For example, <u>RNA551234</u>.</p>



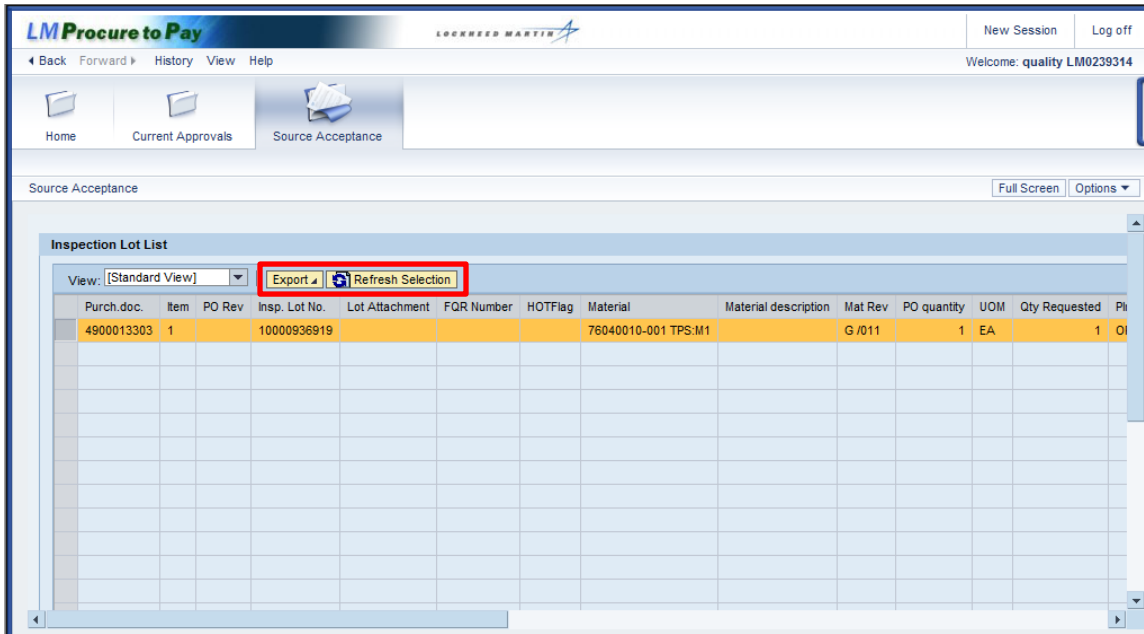
<i>Step</i>	<i>Action</i>
8.	<p>Additional criterion that can be entered to further refine the search include:</p> <ul style="list-style-type: none"> <li>- <b>Requested date:</b> Enter a date range to narrow the list of inspection lots to a specific date. For example, enter a week's range to create your travel plans</li> <li>- <b>PO num:</b> Enter a full PO number and find all line items with matching inspection lots, or enter a range of PO numbers</li> <li>- <b>Item:</b> Enter a specific PO line item number, along with the PO. If left blank, the line items for a specific PO are displayed</li> <li>- <b>FQR Number:</b> Enter a specific Field Quality Request (FQR) number, or a range, to list specific inspection lots</li> </ul>

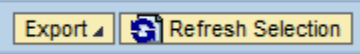
<i>Step</i>	<i>Action</i>
9.	To run the query for <u>PO</u> source inspections at every plant you are assigned to, click the <b>Search</b> button. 

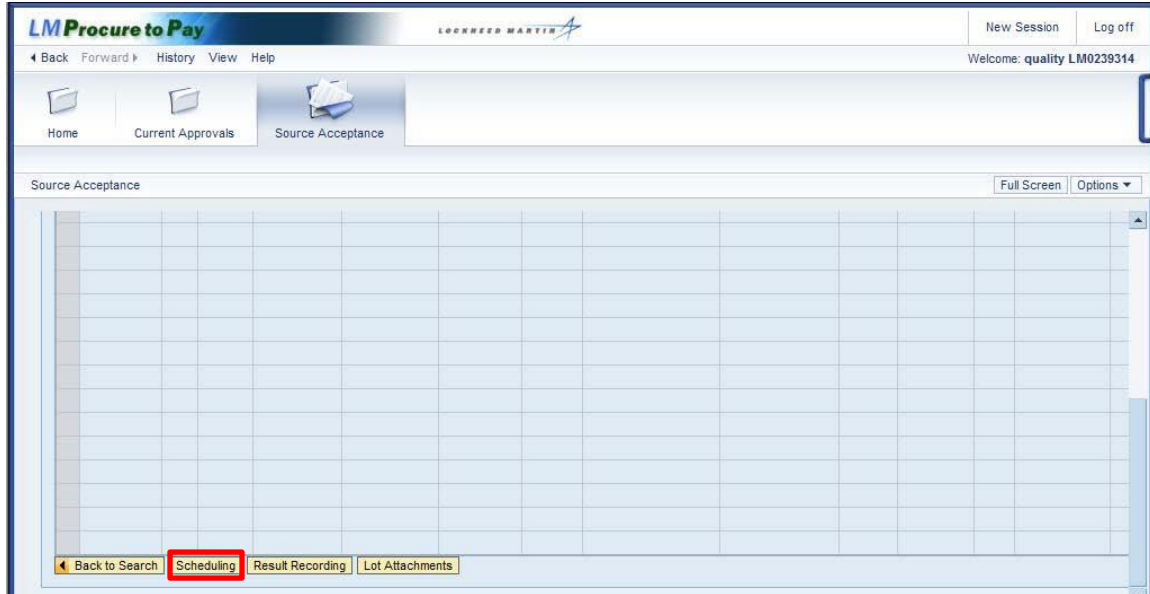


<i>Step</i>	<i>Action</i>
10.	The <i>Inspection Lot List</i> displays all PO inspection lots that are assigned to you.
11.	<p>The <i>Inspection Lot List</i> screen displays information about each lot, and column titles can be sorted and contain the following information:</p> <ul style="list-style-type: none"> <li>- <b>Purch. doc.:</b> Purchase Order (PO) number</li> <li>- <b>Item:</b> PO line item number</li> <li>- <b>PO Rev:</b> Revision number of PO line item</li> <li>- <b>Insp. Lot No.:</b> Inspection lot number, starts with a 1 (PO) or a 7 (FQR)</li> <li>- <b>FQR Number:</b> Field Quality Request number</li> <li>- <b>HOTFlag:</b> Contains an X if a priority inspection</li> <li>- <b>Material:</b> For PO acceptance it is the material, for FQR it is an audit material number</li> <li>- <b>Material description:</b> Name of the material</li> </ul> <p>Click the horizontal <b>scroll bar</b> to display more columns of inspection lot information.</p> <div style="border: 1px solid black; width: 200px; height: 15px; margin-left: 20px;"></div>

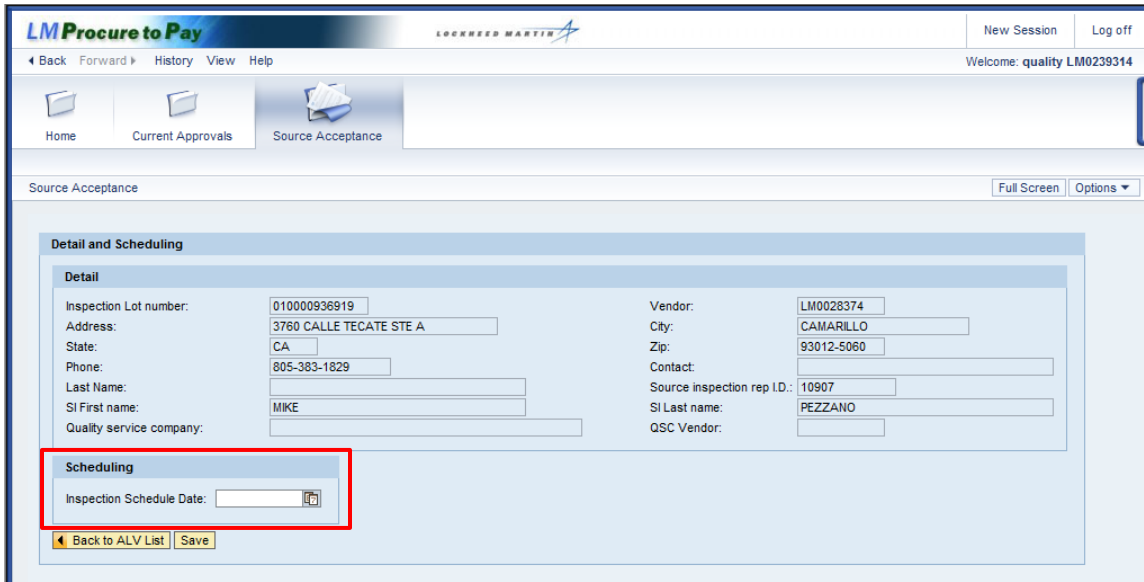
<i>Step</i>	<i>Action</i>
12.	<p>(Continued) Columns describing the inspection lot include:</p> <ul style="list-style-type: none"> <li>- <b>Mat Rev:</b> Revision of the material. For PO acceptance this is the document version of the material master</li> <li>- <b>PO quantity:</b> Quantity ordered for the PO line item</li> <li>- <b>UOM:</b> <u>Unit of Measure</u> (e.g., EA for each or GAL for gallon, etc.)</li> <li>- <b>Qty Requested:</b> Quantity in the inspection lot. FQR quantity is 1 with inspection plan, and 0 without plan</li> <li>- <b>Plnt:</b> Plant code. Contact site rep for list of plant names</li> <li>- <b>POrg:</b> Purchasing Organization</li> <li>- <b>Supplier Vendor Name:</b> Company name</li> <li>- <b>PostalCode:</b> ZIP code of vendor's address</li> <li>- <b>PGr:</b> The buyer's code in PO source acceptance. Contact site rep for list of buyer codes</li> <li>- <b>Inspector ID:</b> Your profile ID</li> </ul> <p>Click the horizontal <b>scroll bar</b> to display more columns of inspection lot information.</p>
13.	<p>(Continued) Columns describing the inspection lot include:</p> <ul style="list-style-type: none"> <li><b>Deliv. date:</b> Date requested for visit to vendor's facility, which you can revise</li> <li><b>QS:</b> <u>Quality Status</u>, or current status code for inspection lot</li> <li><b>Quality Status Description:</b> Current status of inspection lot</li> <li><b>Code:</b> Program Code</li> <li><b>Program Description:</b> Name of the program</li> <li><b>User Status:</b> User status of inspection lot (i.e., in-process or final), for PO acceptance <u>only</u></li> </ul> <p>Click the horizontal <b>scroll bar</b> to display more columns of information.</p>
14.	<p>(Continued) Columns describing the inspection lot include:</p> <ul style="list-style-type: none"> <li>- <b>FQR Type:</b> The type for surveys is SURV. Contact site rep for list of FQRs types</li> <li>- <b>FQR Draw Revision:</b> Revision # of material/process, defined by procedures</li> <li>- <b>SCAR Number:</b> The QNote number of the corrective action, if applicable</li> <li>- <b>FQR Comments:</b> Additional instructions noted in the FQR</li> </ul> <p>You have completed your review of the columns, so click the horizontal <b>scroll bar</b> to return to the initial view of the <i>Inspection Lot List</i>.</p>




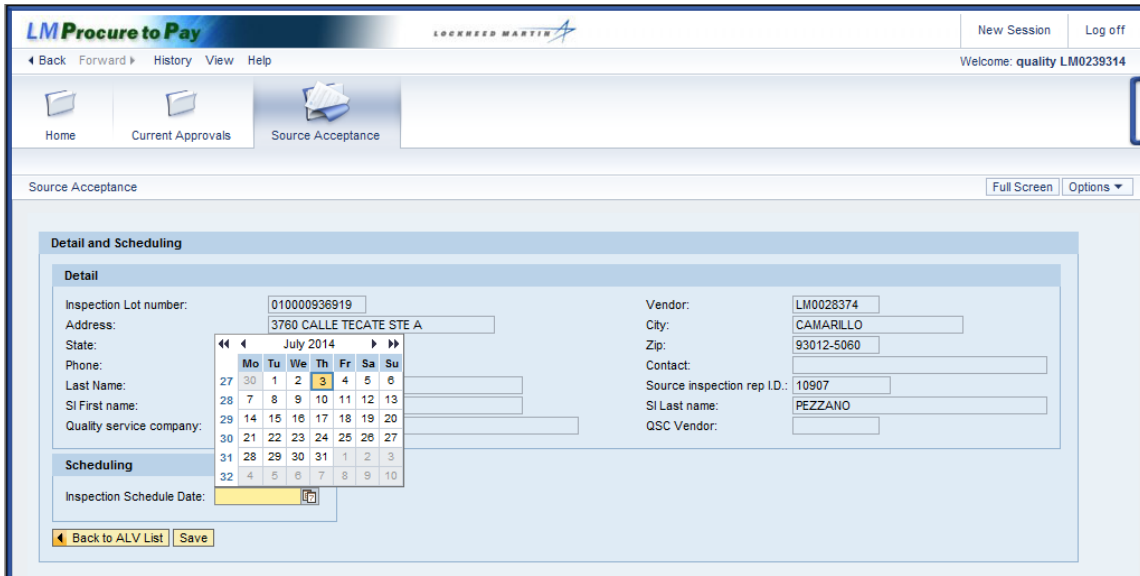
<i>Step</i>	<i>Action</i>
15.	<p>Two buttons are available at the top of this screen:</p> <ul style="list-style-type: none"> <li>- <b>Export:</b> Export and/or print the <i>Lot List</i> in an Excel spreadsheet (.xls)</li> <li>- <b>Refresh Selection:</b> Updates selected lot to the latest status change</li> </ul> 



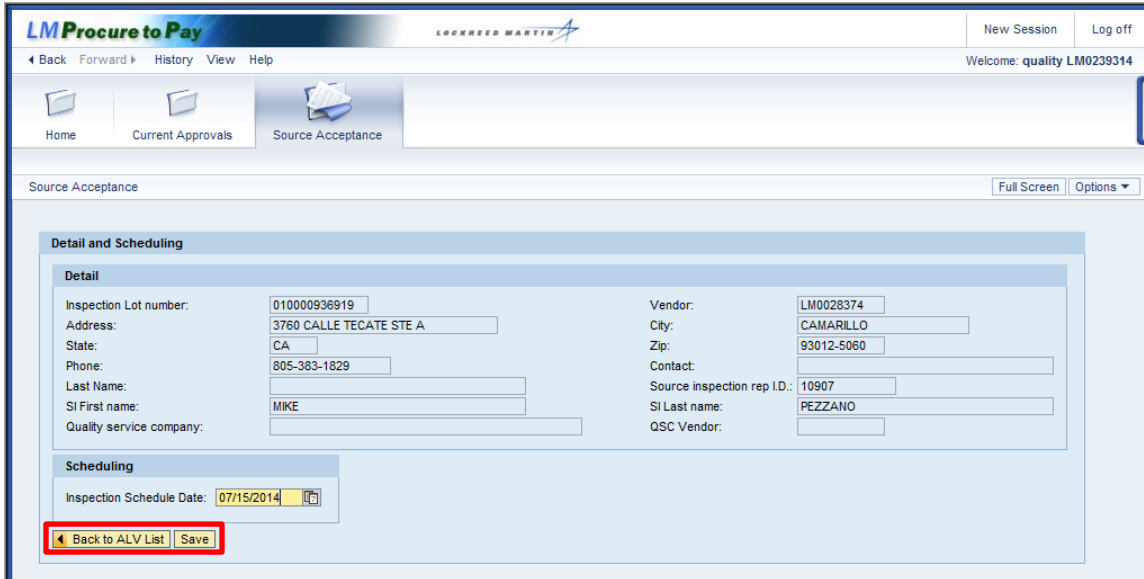
<i>Step</i>	<i>Action</i>
16.	<p>Several buttons are at the bottom of the <i>Inspection Lot List</i>:</p> <ul style="list-style-type: none"> <li>- <b>Back to Search:</b> Returns to <i>Selection of Inspection</i></li> <li>- <b>Result Recording:</b></li> <li>- <b>Lot Attachments</b></li> </ul> <p>Click the <b>Scheduling</b> button.</p> <p><b>Scheduling</b></p>


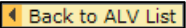


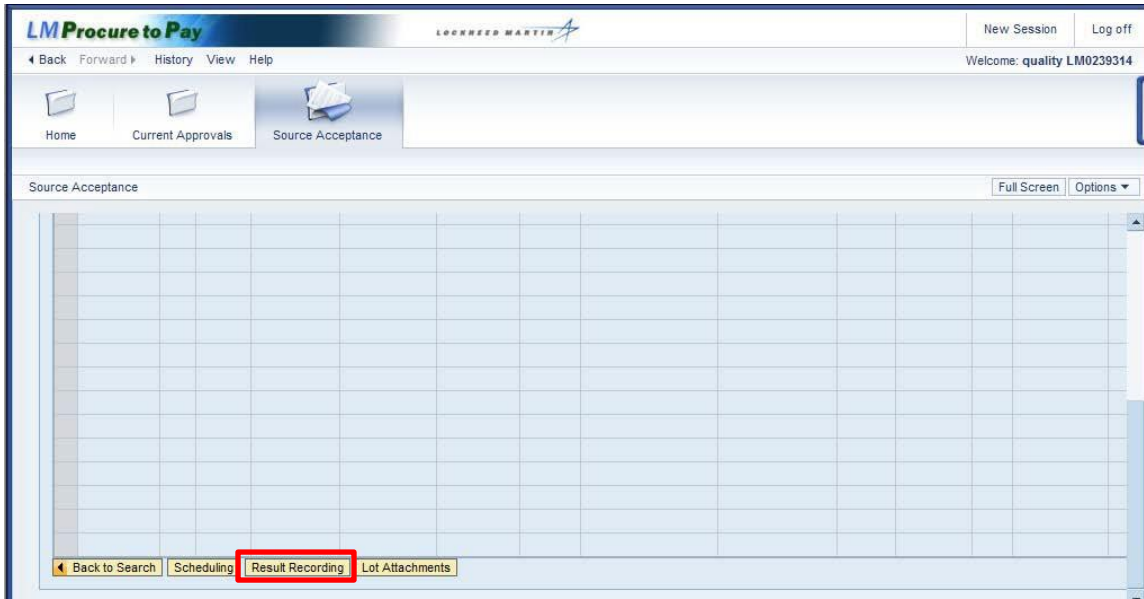
<i>Step</i>	<i>Action</i>
17.	<p>Source inspection information is displayed in the <i>Detail and Scheduling</i> screen.</p> <p>The <i>Detail</i> section includes information about the inspection and the vendor. This is for your reference only, no information can be changed.</p> <p>The <i>Scheduling</i> section allows you to modify the <b>Inspection Schedule Date</b> field, which is optional and is dictated by site procedures.</p>
18.	<p>Click the <b>Inspection Schedule Date</b> matchcode button to enter a date that works with your schedule.</p> <p><b>Inspection Schedule Date:</b> <input type="text"/> </p>




<i>Step</i>	<i>Action</i>
19.	Select the best date for the inspection.

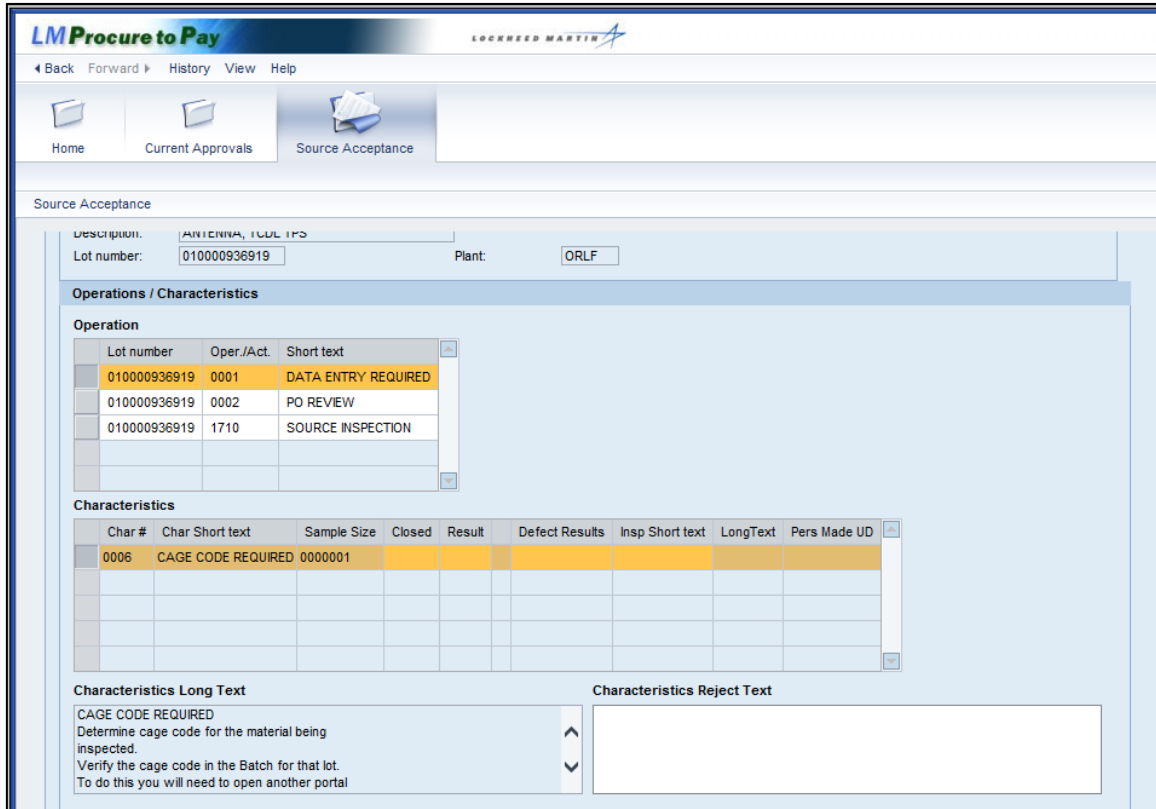


<i>Step</i>	<i>Action</i>
20.	Click the <b>Save</b> button. 
21.	The date you selected date is now displayed as the inspection schedule date.  Click the <b>Back to ALV List</b> button. 
22.	You have returned to the <i>Inspection Lot List</i> .  Click the vertical <b>scroll bar</b> to return to the bottom of the screen.

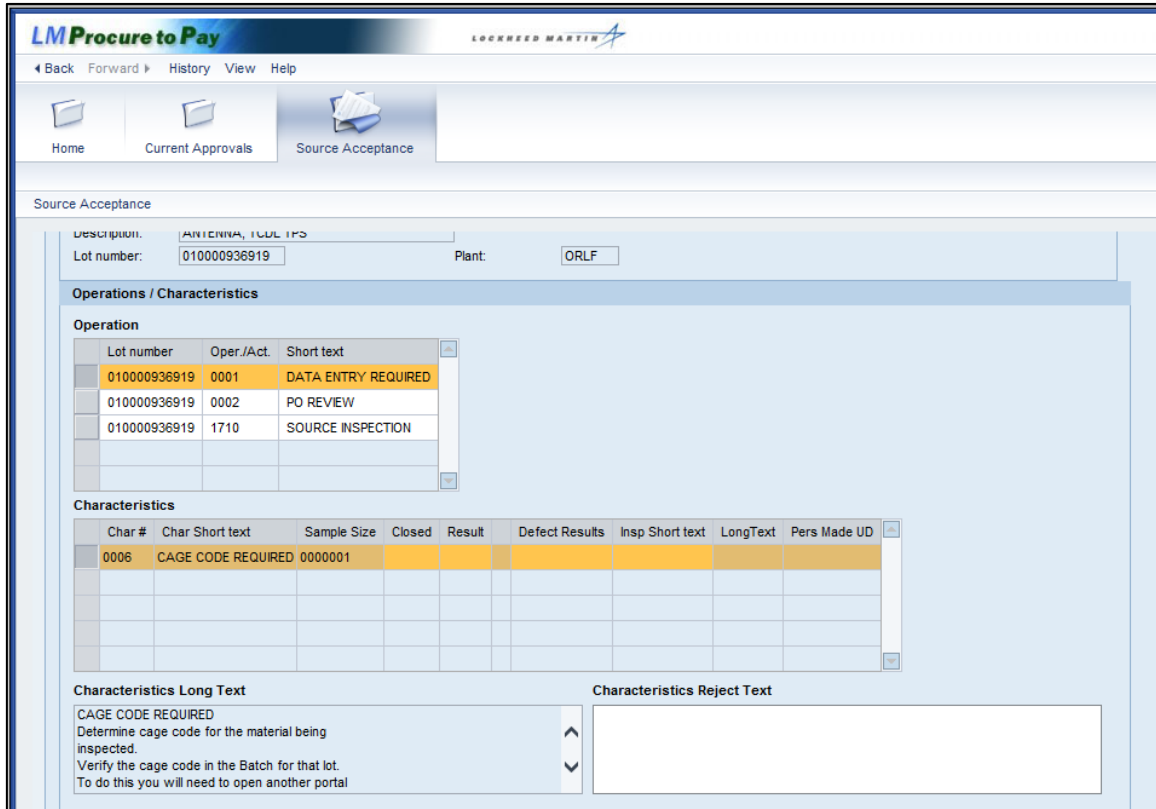


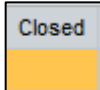
<i>Step</i>	<i>Action</i>
23.	Click the <b>Result Recording</b> button to enter the results of the <u>PO</u> source inspection. 

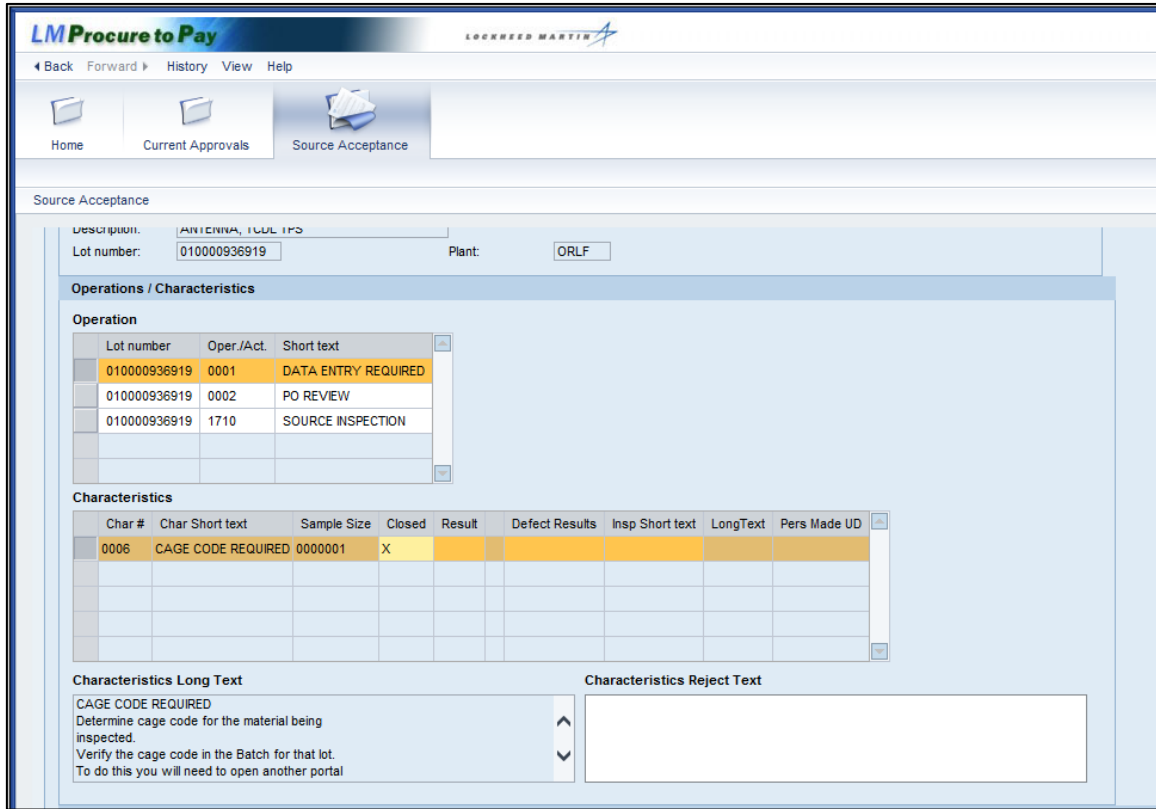
<i>Step</i>	<i>Action</i>
23.	The <i>Source Acceptance Recording</i> screen displays the <i>Header</i> and <i>Operations /Characteristics</i> section.
24.	<p><i>Header:</i> Displays information from the <i>Inspection Lot List</i>, including the vendor's contact person and the Quality Service Company (QSC)</p> <p><i>Operations:</i> An inspection plan has at least 1 operation and 1 characteristic that must be completed. When the inspection plan has more than 1 operation and/or characteristic, you must complete <u>all</u> of them to complete the inspection.</p>





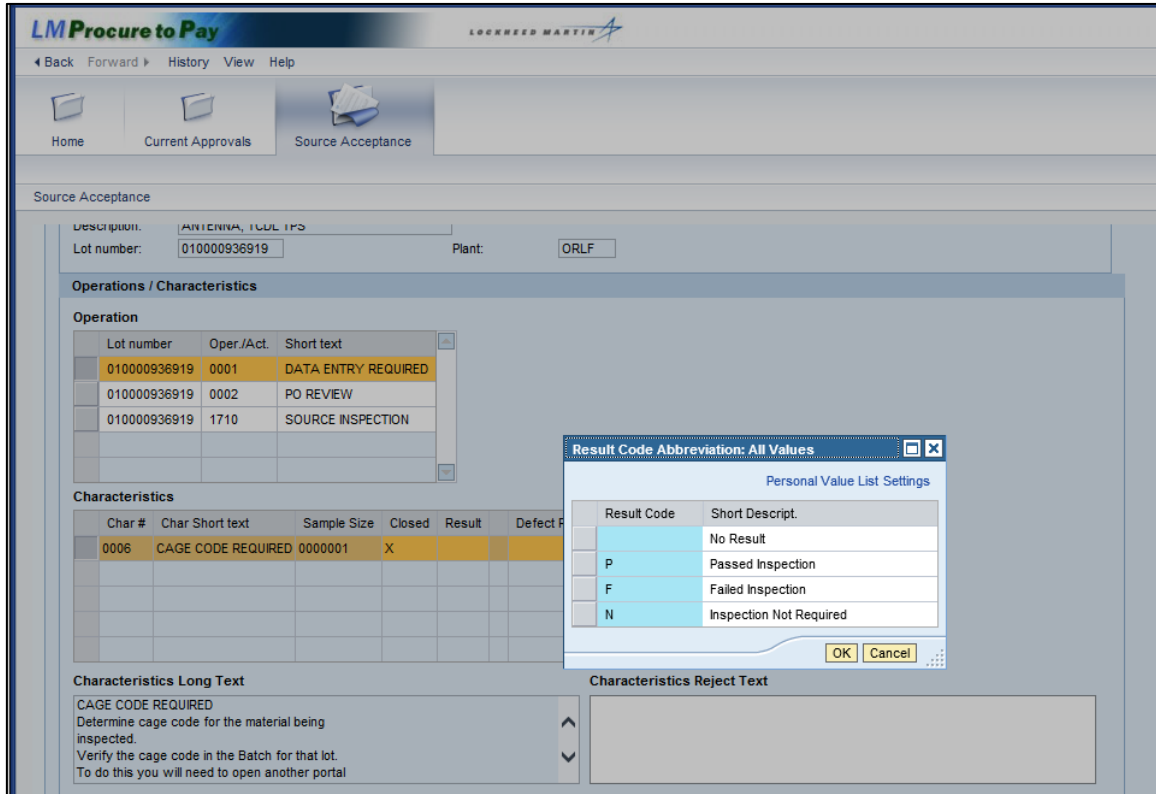
<i>Step</i>	<i>Action</i>
25.	The <i>Characteristics</i> table lists three inspection characteristics for this operation and lot number. If there are more than five listed, you would use the <b>Row arrow keys</b> at the bottom of the table to display all characteristics.




<i>Step</i>	<i>Action</i>
26.	To complete this inspection lot, start by clicking in the <b>Closed</b> field and enter the letter <b>X</b> . 



<i>Step</i>	<i>Action</i>
27.	Click in the <b>Result</b> field to select the results of the characteristic inspection. 
28.	Click the <b>matchcode</b> button to select the result from a list. 



<i>Step</i>	<i>Action</i>
29.	Select the results of your inspection.
30.	Click the <b>OK</b> button. 

Source Acceptance

Description: ANTENNA, TDL FPS  
 Lot number: 010000936919 Plant: ORLF

**Operations / Characteristics**

**Operation**

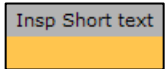
Lot number	Oper./Act.	Short text
010000936919	0001	DATA ENTRY REQUIRED
010000936919	0002	PO REVIEW
010000936919	1710	SOURCE INSPECTION

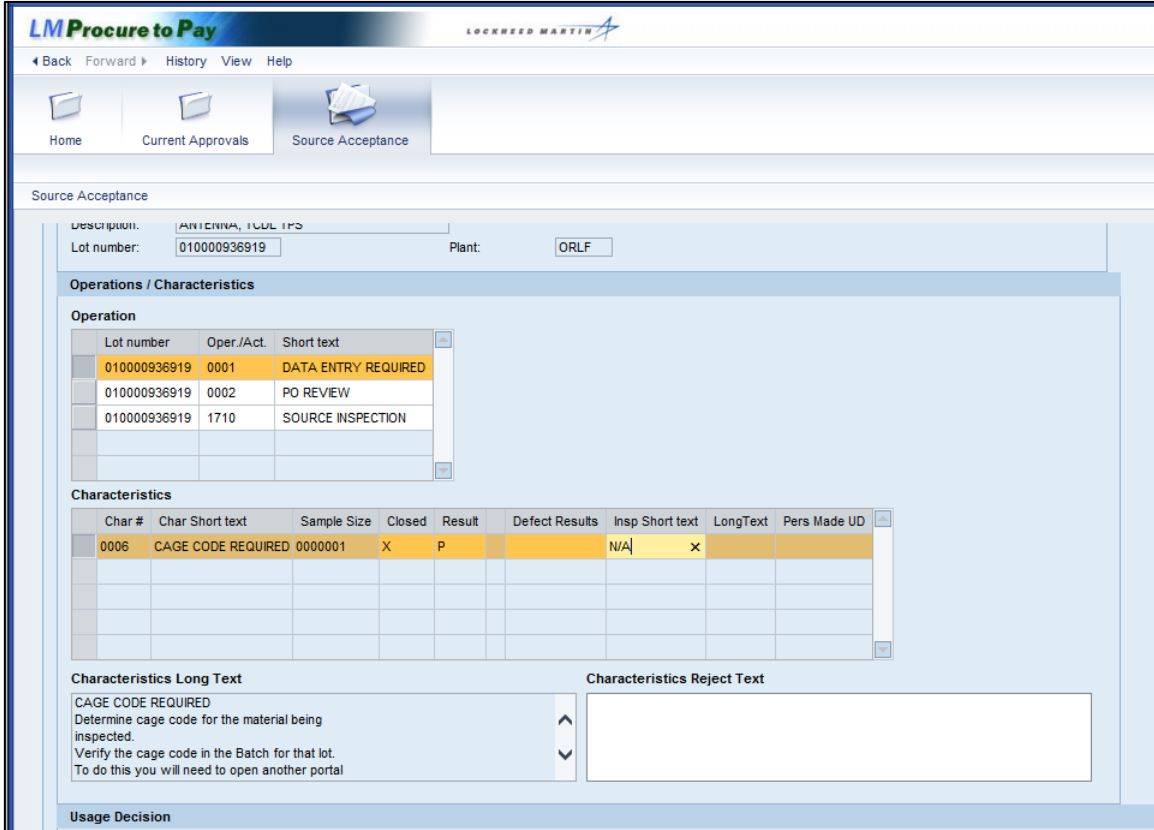
**Characteristics**

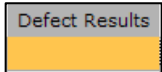
Char #	Char Short text	Sample Size	Closed	Result	Defect Results	Insp Short text	LongText	Pers Made UD
0006	CAGE CODE REQUIRED	0000001	X	P				

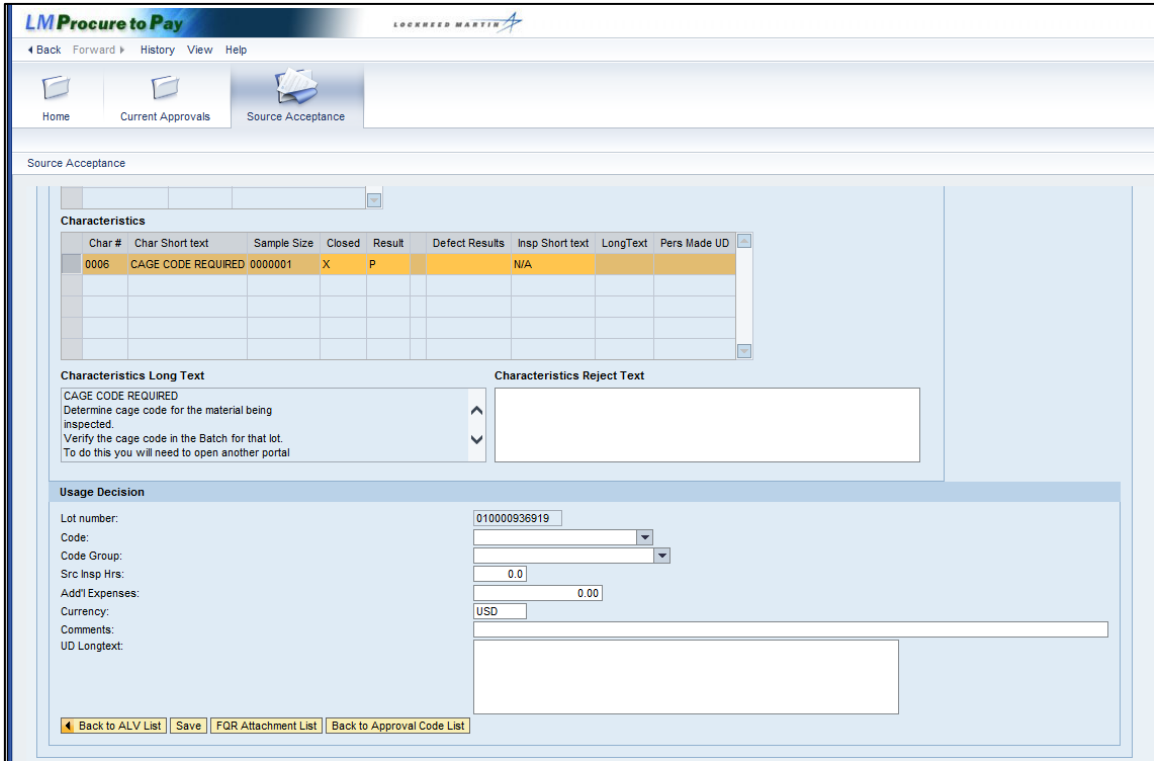
**Characteristics Long Text**  
 CAGE CODE REQUIRED  
 Determine cage code for the material being inspected.  
 Verify the cage code in the Batch for that lot.  
 To do this you will need to open another portal

**Characteristics Reject Text**

<i>Step</i>	<i>Action</i>
31.	Click in the <b>Insp Short text</b> field and enter short text regarding inspection results for this characteristic 



<i>Step</i>	<i>Action</i>
32.	<p>If the lot had failed inspection, you would have entered the defective quantity in the <b>Defect Results</b> field, and then noted the details in the <b>Characteristics Reject Text</b> field.</p> 
33.	<p>Click the vertical <b>scroll bar</b> to enter the usage decision.</p>



<i>Step</i>	<i>Action</i>
34.	<p>The <i>Usage Decision</i> section is displayed. Fields in this section include:</p> <ul style="list-style-type: none"> <li>- <b>Lot number:</b> The lot number you are currently inspecting</li> <li>- <b>Code:</b> Every lot requires a usage decision, which is the final disposition of the entire lot</li> <li>- <b>Code Group:</b> This field auto-completes once the code is selected</li> <li>- <b>Src Insp Hrs:</b> 3rd party SI Reps should enter the time charged for processing this lot, as directed</li> <li>- <b>Add'l Expenses:</b> 3rd party SI Reps should enter any additional expenses for processing lot, as directed</li> <li>- <b>Currency:</b> Currency of expenses entered. The default is <u>United States Dollars</u> (USD)</li> <li>- <b>Comments:</b> Enter as needed to explain and justify expenses</li> <li>- <b>UD Longtext:</b> Enter as needed to provide further details about the usage decision</li> </ul>

**Characteristics**

Char #	Char Short text	Sample Size	Closed	Result	Defect Results	Insp Short text	LongText	Pers Made UD
0006	CAGE CODE REQUIRED	0000001	X	P		N/A		

**Characteristics Long Text**

CAGE CODE REQUIRED  
Determine cage code for the material being inspected.  
Verify the cage code in the Batch for that lot.  
To do this you will need to open another portal

**Characteristics Reject Text**

**Usage Decision**

Lot number: 010000936919

Code: ▼

Code Group: ▼

Src Insp Hrs: 0.0

Add'l Expenses: 0.00

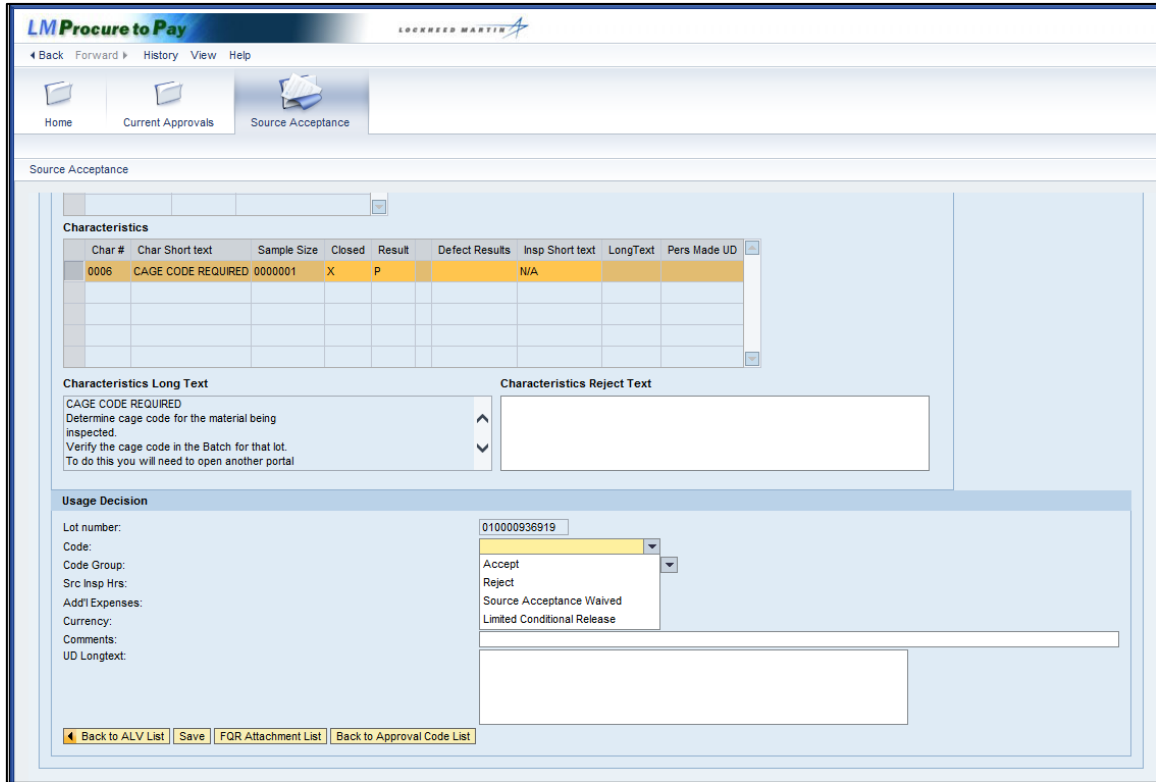
Currency: USD

Comments:

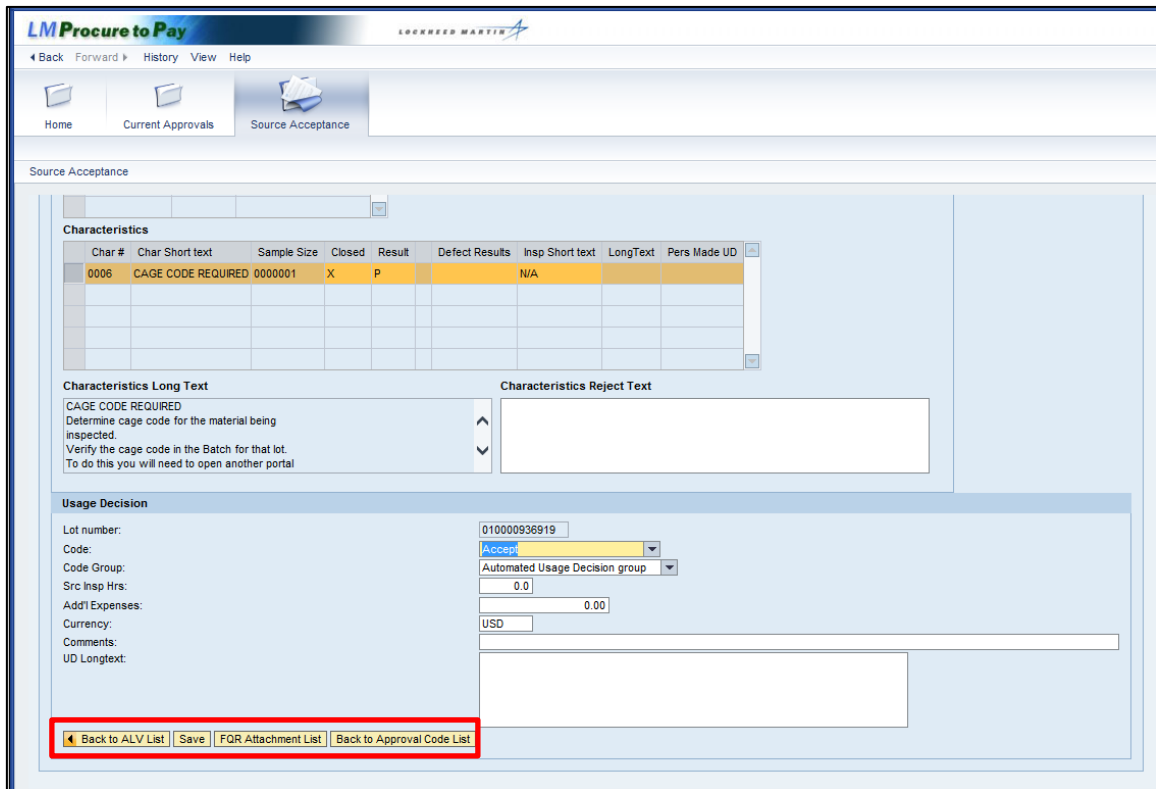
UD Longtext:

[Back to ALV List](#) | 
 [Save](#) | 
 [FQR Attachment List](#) | 
 [Back to Approval Code List](#)

<i>Step</i>	<i>Action</i>
35.	Click the <b>Code</b> drop-down button to select the usage decision from a list.



<i>Step</i>	<i>Action</i>
36.	<p>There are four usage decision codes listed in the drop-down box:</p> <ul style="list-style-type: none"> <li>- <b>Accept</b>: Chosen if all characteristics are accepted, or as directed by your site. Some lots with a rejection may be acceptable. For example, your site may direct you to accept the lot and set a hold flag upon Goods Receipt, which stops the lots for further consideration by the Material Review Board (MRB)</li> <li>- <b>Reject</b>: Chosen if you encounter any rejections while inspecting characteristics, or as directed by your site</li> <li>- <b>Source Acceptance Waived</b>: Chosen <u>only</u> when directed by your site, it cancels the source acceptance</li> <li>- <b>Limited Conditional Release</b></li> </ul>



<i>Step</i>	<i>Action</i>
37.	<p>There are several buttons options available at the bottom of this screen:</p> <ul style="list-style-type: none"> <li>- <b>Back to ALV List:</b> Return to the <i>Inspection Lot List</i></li> <li>- <b>FQR Attachment List:</b> FQR lots may have attachments with instructions</li> <li>- <b>Back to Approval Code List:</b> Returns to <i>Approval Code List</i> (Survey FQR lot only)</li> </ul>

LM Procure to Pay

Source Acceptance

Char #	Char Short text	Sample Size	Closed	Result	Defect Results	Insp Short text	LongText	Pers Made UD
0006	CAGE CODE REQUIRED	0000001	X	P		N/A		

Characteristics Long Text

CAGE CODE REQUIRED  
Determine cage code for the material being inspected.  
Verify the cage code in the Batch for that lot.  
To do this you will need to open another portal

Characteristics Reject Text

Usage Decision

Lot number: 010000936919  
Code: Accept  
Code Group: Automated Usage Decision group  
Src Insp Hrs: 0.0  
Add'l Expenses: 0.00  
Currency: USD

Back to ALV List **Save** FQR Attachment List Back to Approval Code List

<i>Step</i>	<i>Action</i>
38.	To complete the inspection lot with a usage decision of accept, click the <b>Save</b> button to confirm if your entries have been correctly recorded. <b>Save</b>

Source Acceptance

All inspection characteristics results recorded successfully for lot 010000936919.

**Recording**

**Header**

Vend Supl Name: CPI MALIBU DIVISION      Order quantity: 1      FQR Number:   
 QSC:      Qty Requested: 1      FQR Type:   
 Contact Person:      Purchasing doc.: 4900013303      FQR Draw Revision:   
 User status: Final Source Requested      Item: 00001      FQR Comments:   
 Material: 76040010-001      TPS:M1      Material Revision:      SCAR Number:   
 Description: ANTENNA, TCDL TPS   
 Lot number: 010000936919      Plant: ORLF

**Operations / Characteristics**

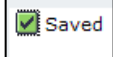
**Operation**

Lot number	Oper./Act.	Short text
010000936919	0001	DATA ENTRY REQUIRED
010000936919	0002	PO REVIEW
010000936919	1710	SOURCE INSPECTION

**Characteristics**

Char #	Char Short text	Sample Size	Closed	Result	Defect Results	Insp Short text	LongText	Pers Made UD
0006	CAGE CODE REQUIRED	0000001	X	P		N/A		

Characteristics Long Text      Characteristics Reject Text

<i>Step</i>	<i>Action</i>
39.	The message at the top left of the screen indicates you have saved your inspection results, so you have completed the source inspection. 
40.	You have successfully completed the procedure to process a Purchase Order Source Acceptance.