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| --- | --- |
|  |  |
| Master Data Script  SAP S/4HANA - 18-09-20 | public |
| Create Quality Info Record (BF5) |

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# Purpose

If a quality assurance agreement or a supplier release is required for a material, a quality planner must create a quality information record (quality info record). The quality info record determines how the material can be processed further.

When a purchase order is created, the system checks whether a quality info record is required and available for the combination of material and supplier.

The system also checks whether the supplier and material-supplier combination is blocked or released for quotations, purchase orders and/or goods receipt. The execution of this check depends on the settings of the QM in procurement control key in the material master.

# Prerequisites

This section summarizes all the prerequisites for conducting the test in terms of systems, users, master data, organizational data, other test data and business conditions.

## System Access

|  |  |
| --- | --- |
| System | Details |
| System | Accessible via SAP Fiori launchpad. Your system administrator provides you with the URL to access the various apps assigned to your role. |

## Roles

Assign the following business roles to your individual test users. Alternatively, if available, you can create business roles using the following spaces with pages and predefined apps for the SAP Fiori launchpad and assign the business roles to your individual test users.

Note These roles or spaces are examples provided by SAP. You can use them as templates to create your own roles or spaces.

For more information about business roles, refer to Assigning business roles to a user in the [Administration Guide to Implementation of SAP S/4HANA with SAP Best Practices](https://help.sap.com/viewer/S4HANA2020_AdminGuide) .

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name (Role) | ID (Role) | Description (Space) | ID (Space) | Log On |
| Quality Planner | SAP\_BR\_QUALITY\_PLANNER | Quality Planning | SAP\_BR\_QUALITY\_PLANNER |  |

For more information about business roles, refer to Assigning business roles to a user in the Administration Guide for the Implementation of SAP S/4HANA

## Required Organizational Units

Some segments of customer master data are dependent on the organizational units of the company, General (Central) Data does not depend on an organizational unit or the company code. The following table gives an overview of these different data segments and their relevant organizational units:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Data Segment | Depends On | Field Examples | Comments | Organizational Unit to be Used |
| Quality Info Record | Plant |  | Plant data can exist for every Plant ID of your enterprise structure for which the material master record is used. | Plant: |

## Mandatory and Optional Master Data

Quality management data records may refer to other master data. The following table gives an overview of optional and mandatory master data objects to be used in a quality info record.

|  |  |  |  |
| --- | --- | --- | --- |
| Master Data Object | Used in Data Segment | Mandatory / Optional | Comments |
| Material Master |  | Mandatory | With quality management view. For more information, the master data script, Create Quality Management Attributes for Material/Product Master (BNY). |
| Supplier Master |  | Mandatory |  |

# Overview Table

This scope item consists of several process steps that are listed in the following table:

If your system administrator has enabled spaces and pages on the SAP Fiori launchpad, the homepage will only contain the essential apps for performing the typical tasks of a business role.

You can find all other apps not included on the homepage using the search bar.

If you want to personalize the homepage and include the hidden apps, navigate to your user profile and choose Settings > App Finder .

|  |  |  |  |
| --- | --- | --- | --- |
| Process Step | Business Role | App/Transaction | Expected Results |
| [Create Quality Info Record in Procurement](#unique_8) [page ] 6 | Quality Planner | Create Quality Info Record - Procurement (QI01) | A Quality Info Record is created. |
| [Create Quality Info Record for Materials Without Quality Info Record (Optional)](#unique_9) [page ] 7 | Quality Planner | Manage Quality Info Records (F2256A) | A Quality Info Record is created. |

# Test Procedures

This section describes test procedures for each process step that belongs to this scope item.

## Create Quality Info Record in Procurement

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  | | | | |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | Enter a duration. |

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log onto the SAP Fiori launchpad as a Quality Planner. | The SAP Fiori launchpad displays. |  |
| 2 | Access the SAP Fiori App | Open Create Quality Info Record - Procurement (QI01). | The Create Q-Info Record view displays. |  |
| 3 | Enter General Data | Make the following entries:   * Material: <material number> * Supplier: <supplier code> * Plant: <plant code>   Choose Continue. |  |  |
| 4 | Enter Release Data | In the Release section, enter the following data:   * Release Until: date in the future, for example, in one year * Release Qty Active: flagged * Release Quantity: for example, 15 |  |  |
| 5 | Enter Block Data | In the Block section, enter the following data:  Block Reason: Quality Limitation (Q-Inf) |  |  |
| 6 | Save Your Data | Choose Save. | Your data is saved. |  |

## Create Quality Info Record for Materials Without Quality Info Record (Optional)

Test Administration

Customer project: Fill in the project-specific parts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Test Case ID | <X.XX> | Tester Name |  | Testing Date | Enter a test date. |
| Business Role(s) |  | | | | |
| Responsibility | <State the Service Provider, Customer or Joint Service Provider and Customer> | | | Duration | Enter a duration. |

Procedure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Test Step # | Test Step Name | Instruction | Expected Result | Comments |
| 1 | Log On | Log on to the SAP Fiori launchpad as a Quality Planner. | The SAP Fiori launchpad displays. |  |
| 2 | Access the SAP Fiori App | Open Manage Quality Info Records (F2256A). |  |  |
| 3 | Create Quality Info Record (Optional) | Choose Create Object (+) in the upper right corner of the results table and maintain the following data in the Header level:   * Material: material number * Supplier: supplier code * Plant: plant code   For the Release section, refer to the previous chapter, steps 4 and 5. |  |  |
| 4 | Save Your Data | Choose Save. | Your data is saved and a new quality info record was created. |  |
| 5 | Search Materials Without Quality Info Record (Optional) | On the Manage Quality Info Records screen, maintain the following search parameters to list all materials without quality info record in the current plant:   * Plant: <plant code>   Choose Go. | Materials without quality info record are displayed |  |
| 6 | Create Quality Info Record for a Line Item (Optional) | Choose Create for a line item you want to create a quality info record and maintain data (For example data, refer to the previous chapter, steps 4 and 5). |  |  |

Typographic Conventions

|  |  |
| --- | --- |
| Type Style | Description |
| Example | Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options.  Textual cross-references to other documents. |
| Example | Emphasized words or expressions. |
| EXAMPLE | Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE. |
| Example | Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools. |
| Example | Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation. |
| <Example> | Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system. |
| EXAMPLE | Keys on the keyboard, for example, F2 or ENTER. |

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