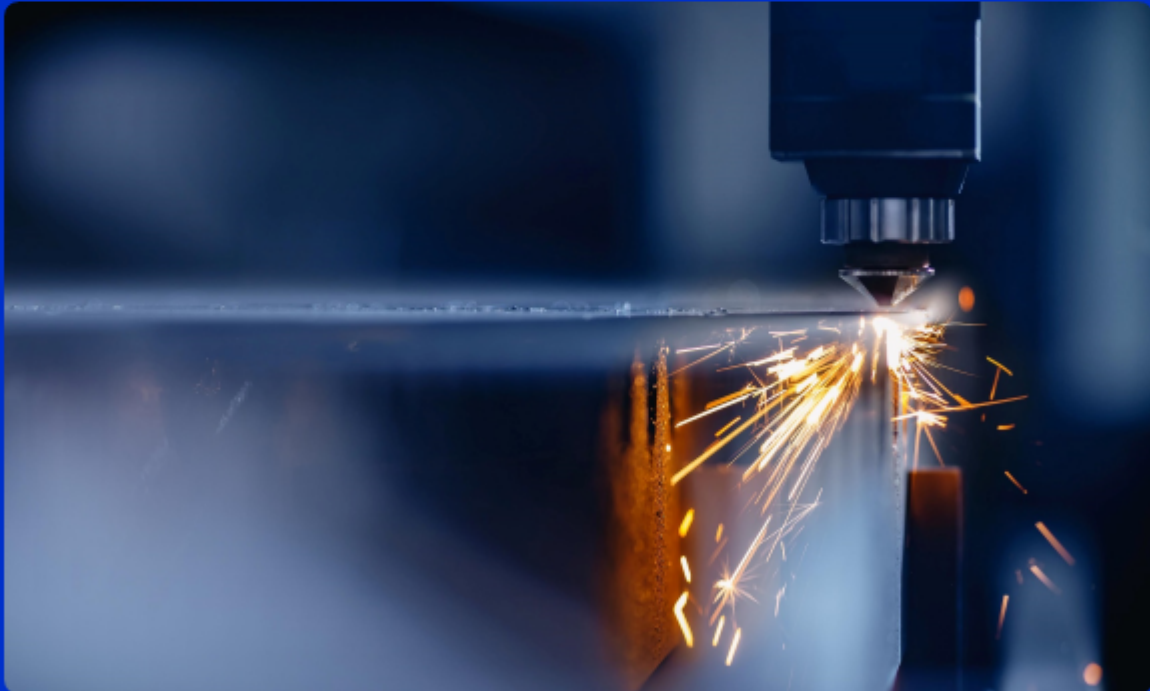


Quality Documentation

Syspro 8

Reference Guide

Published: May 2026



syspro

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Topic: Quality Documentation

Exploring

Where it fits in?

We introduce a new feature called **Quality Documentation**, a governed, template-driven library embedded with the **Quality Management** module that produces Quality Documentation, such as Certificate of Conformance (CoC), Quality Assurance Plans, Inspection and Test Reports, and Supplier Quality Agreements, surfacing alongside inspections and job records for auditable traceability. This centralized, version-controlled content streamlines compliance and accelerates cross-functional collaboration.

Benefits

- Standardized quality documentation. Enables the generation and printing of essential quality documents, using consistent, system-controlled formats.
- Centralized control and accessibility of quality documents. Brings the creation and management of quality documentation into a single, integration area within Quality Management.
- Improved traceability and audit support. Links quality documents directly to inspections, stock items, lots, serials, jobs, making it easier to retrieve accurate documentation for audits, recalls and investigations.
- Helps minimize compliance gaps by ensuring quality documentation is generated from validated system data and follows standardized formats across processes and departments.

Functionality

- A central library provides templates for Certificate of Conformance, Certificate of Analysis, and inspection reports.
- Users configure and customize templates to generate documents quickly from standardized formats.
- Integration with Quality Management workflows ensures documentation availability during inspection, production, and supplier processes.

Navigation

The programs related to this feature are accessed from the [Program List](#) of the Syspro menu:

Program List > Quality Management > Documents

Terminology

Certificate of Conformance (CoC)

This certifies that finished goods meet specified standards, regulations, or customer requirements.



The CoC's number will be generated using the following pattern: InspectType + InspectNumber + Lot + EndDate.

Finished Goods Inspection Report (FGIR)

Records detailed inspection results for completed products (Jobs and Purchase Order Receipts). This can be printed as a standalone document or alongside the **Certificate of Conformance (CoC)**.



This is a supporting document and can be printed additionally. The option exist to either print the CoC or FGIR.

Incoming Goods Inspection Report (IGIR)

This report display the results of inspections performed on goods received from a supplier before they enter production. Typically, generated from PO receipt inspection data (from Jobs and Purchase Order Receipts).

Certificate of Analysis (CoA)

Documents analytical test results (chemical composition, physical properties) for raw materials or components received from a supplier. This document certifies that the product has been tested against the set quality criteria as configured in the quality tests.



The CoA's number will be generated using the following pattern: InspectType + InspectNumber + Lot + EndDate

Lot Traceability Report

This report provides a comprehensive record of a batch or lot's journey through production and supply chain, supporting audits, recalls, and regulatory compliance. Detailing the input raw material, where applicable, as well as the processes completed against the lot.

Unique Facility Identifier (FID)

A 50-character identifier for a warehouse or work center, used to support EU Digital Product Passport (DPP) traceability requirements.

Starting

Prerequisites

Ensure Quality Management is available and stock codes are configured as **QM inspection required**.

- **Stock Code Maintenance**

To use this feature, the following setup option(s) must be enabled/defined:

Program List > Inventory > Setup - Tracking pane:

- Quality management
 - QM inspection required
- Lot traceability control
 - Lot traceability
 - This must be defined as **Inspection required**.
 - Traceable
 - This must be defined as **With inspection**.
- Allow issues from multiple lots

Solving

FAQs

How do I set up Quality Documentation?

To use Quality Documentation, you must complete a once-off setup process to define document formats, configure inspection tests, control which inspection results are included on each document, and ensure inspections are completed before printing.

To set up Quality Documentation:

- Ensure Quality Management is available and stock codes are configured as QM inspectable.

- **Stock Code Maintenance**

To use this feature, the following setup option(s) must be enabled/defined:

Program List > Inventory > Setup - Tracking pane:

- Quality management
 - QM inspection required
- Lot traceability control
 - Lot traceability
 - This must be defined as **Inspection required**.
 - Traceable
 - This must be defined as **With inspection**.
 - Allow issues from multiple lots

- Define quality document formats

- Use **Quality Document Format¹** (*Program List > Quality Management > Documents*) to define the formats for each supported document type (for example, Certificate of Conformance).
- The Quality Document Format process is as follows:
 - Select the document type you want to define:
 - Certificate of Conformance
 - Finished Goods Inspection Report
 - Incoming Goods Inspection Report
 - Certificate of Analysis
 - Lot Traceability Report



These documents are intended to provide formal proof of quality outcomes.

¹Program: SQMPFT

- □ □ In the format options, select the **Print date format**.
 - Use **SRS options** to select the report definition to be used for this document type.
 - **Save** the format definition. The stored format will be applied when printing the selected document type.
- Configure Inspection Test Design
 - In **Inspection Test Design¹** (*Program List > Quality Management > Setup*), specify which inspection test captions and results must be included on each document type by selecting the applicable **Include in certificate** options.
 - Capture regulatory standards where required.
- Maintain facility identifiers (if applicable)
 - Capture the **Unique Facility Identifier** (FID) against warehouses (and optional work centres) in **Warehouse Maintenance** (*Program List > Inventory > Setup > Warehouses*) to include facility traceability information on quality documents.

Unique Facility Identifier (FID)

A 50-character identifier for a warehouse or work center, used to support EU Digital Product Passport (DPP) traceability requirements.

Once these steps are completed, the system is ready to generate quality documentation during operational processing.

How do I generate and print Quality Documentation?

Quality documents are generated after inspections are completed and are printed using the relevant Quality Documentation print programs.

To generate and print quality documentation:

- Perform and complete inspections:
 - Flag inspection tests in the **Inspection Test Design²** program for inclusion in Quality Documentation. These settings control which tests results are included on documents such as the **Certificate of Conformance**, which can only be generated once all required inspection tests are completed.
 - Complete inspections using standard Quality Management processes. Quality documents can only be generated once all required inspection tests are completed.
- Select the relevant print program based on the inspection type:
 - WIP Quality Inspection Print for WIP-related documents (for example, CoC or FGIR)
 - PO Quality Inspection Print for purchase order inspections (for example, IGIR or CoA)
 - Lot Traceability Tracking Print for batch/lot/serial traceability documentation.

¹Program name: SQMFRM

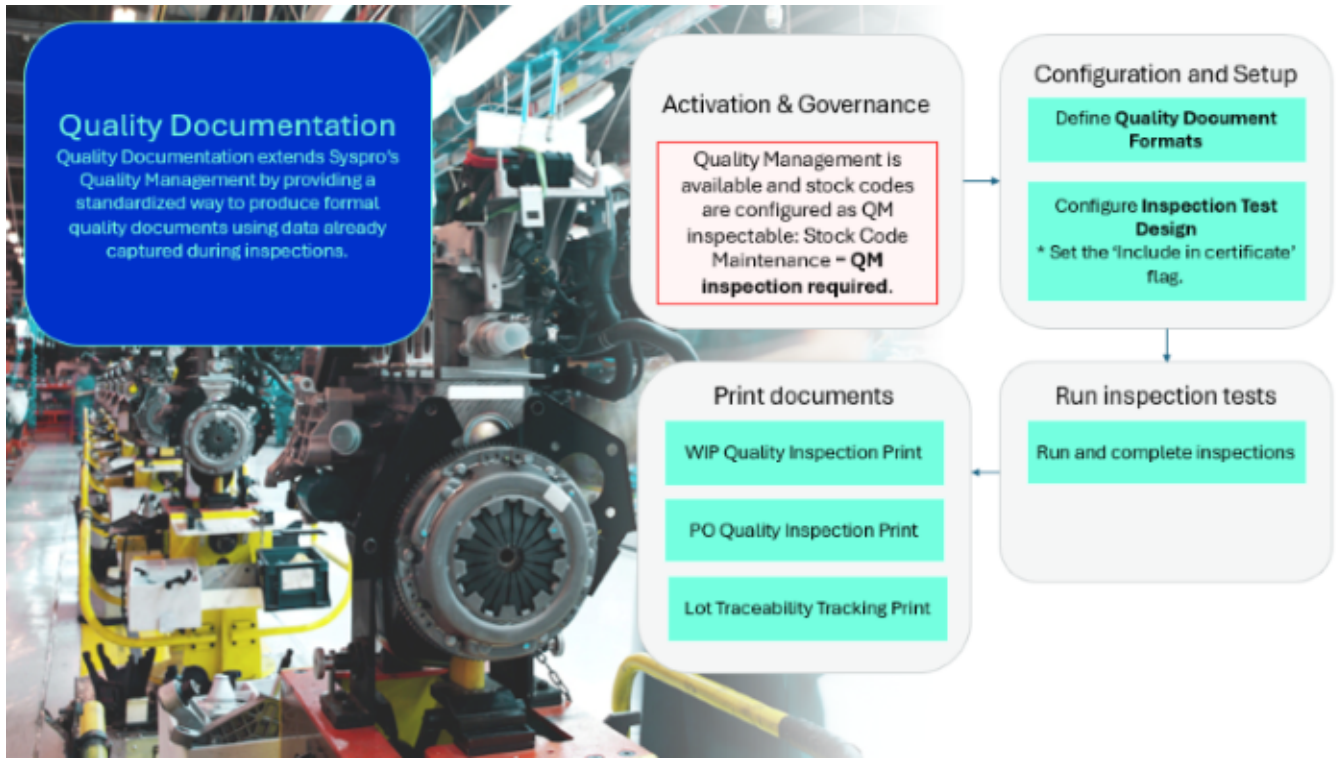
²Program name: SQMFRM

- Apply selection criteria and Print
 - Enter the required selection criteria (such as stock code, job, purchase order, lot or serial) and print the selected quality document.




Quality Documentation is generated from existing inspection data. Documents are not stored as separate archived files, but can be reprinted when required, provided the inspection data remains available.

Using Process



Considerations


- Enable the **QM INSPECTION REQUIRED** option within the **Stock Code Maintenance** program.

 The **LOT TRACEABILITY** option will automatically be defined as **Inspection required** and the **TRACEABLE** option as **With inspection**.

Configuration and Setup

- Ensure Quality Management is available and stock codes are configured as QM inspectable.
- Use **Quality Document Format**¹ (*Program List > Quality Management > Documents*) to define the formats for each supported document type (for example, Certificate of Conformance).

¹Program: SQMPFT

- 
Quality Document Format¹ is the central setup program for Quality Documentation. It stores the configuration that controls how each document type is printed - the date format and the SRS report layout it calls. You must define a format for every document type you intend to use.

Quality Document Format

The Quality Document Format process is as follows: Select the document type you want to define: Certificate of Conformance Finished Goods Inspection Report Incoming Goods Inspection Report Certificate of Analysis Lot Traceability Report These documents are intended to provide formal proof of quality outcomes. In the format options, select the **Print date format**. Use **SRS options** to select the report definition to be used for this document type. **Save** the format definition. The stored format will be applied when printing the selected document type.

- Design and create the inspection tests using the **Inspection Test Design²** program (*Program List > Quality Management > Setup*).

Inspection Test Design

Each quality document draws its tests results from the inspection data captured against the inspection test design. Control which test captions appear on which document by setting the including flags under **Include in certificate**. Applicable regulatory standards can also be captured in **Regulatory Standards**.

Run inspection tests using the Inspection Engine

- Depending whether you are inspecting purchased or manufactured items, receipt items into inspection and count the received quantities using the **Purchase Order Receipts** or **WIP Inspection Maintenance** program.
- Select the inspection level using the **Inspection Level Select³** program.



This program will only be displayed if the **Sample basis** field is defined as **Sample quantity** within the **Inspection Level Review⁴** program.

- Once the inspection level is selected, the following fields within the **Purchase Order Receipts** or **WIP Inspection Maintenance** program are updated:
 - The **QM inspection status** reflects **Y - IN PROGRESS**, as the items have been counted.
 - The number of items that must be inspected is reflected at the **Quantity in quarantine** field.

¹Program: SQMPFT

²Program name: SQMFRM

³Program name: SQMILR

⁴Program name: SQMLVR

4. Inspect the items and submit the results of the sample tests using the **Inspection Test Queue**¹ program.

Once all the quarantined items are inspected and the test results submitted, the **Inspection complete** field displays **Yes** and the **Inspection status** is updated to **Y - PASSED INSPECTION** or **N - FAILED INSPECTION**.

5. Accept items into stock (or scrap, send for rework, reject, or QM return items) using the the **Purchase Order Receipts** or **WIP Inspection Maintenance** programs.

The **QMS inspection status** reflects **C - COMPLETE**.

Print documents

Quality documents are generated after inspections are completed and are printed using the relevant Quality Documentation print programs.

To generate and print quality documentation:

- Perform and complete inspections:
 - Flag inspection tests in the **Inspection Test Design**² program for inclusion in Quality Documentation. These settings control which tests results are included on documents such as the **Certificate of Conformance**, which can only be generated once all required inspection tests are completed.
 - Complete inspections using standard Quality Management processes. Quality documents can only be generated once all required inspection tests are completed.
- Select the relevant print program based on the inspection type:
 - WIP Quality Inspection Print for WIP-related documents (for example, CoC or FGIR)
 - PO Quality Inspection Print for purchase order inspections (for example, IGIR or CoA)
 - Lot Traceability Tracking Print for batch/lot/serial traceability documentation.
- Apply selection criteria and Print
 - Enter the required selection criteria (such as stock code, job, purchase order, lot or serial) and print the selected quality document.



Quality Documentation is generated from existing inspection data. Documents are not stored as separate archived files, but can be reprinted when required, provided the inspection data remains available.

¹Program name: SQMWLS

²Program name: SQMFRM

Affected programs

The following indicates areas in the product that may be affected by implementing this feature:

Setup programs

Quality Document Format

Program List > Quality Management > Documents

Use this program to define and maintain the document formats for each **Quality Documentation** type, storing format and date settings used when generating quality documents.

Inspection Test Design

Program List > Quality Management > Setup

This program lets you design your own inspection tests that are used in the **Quality Management** module when inspecting work in progress (WIP) and purchase order receipts.

The following indicates areas in the product that may be affected by implementing this feature:

- The program has been updated with a new section that allows you to flag inspection tests for inclusion in Quality Documentation. These settings control which tests results are included on documents such as the **Certificate of Conformance**, which can only be generated once all required inspection tests are completed.

Warehouse Maintenance

Program List > Inventory > Setup

This program lets you capture and maintain details of warehouses required within the system.

The following indicates areas in the product that may be affected by implementing this feature:

- The program was enhanced by adding a new field, **Unique Facility Identifier** (FID), used to support traceability requirements.

Batch programs

Inspection Test Queue

Program List > Quality Management > Inspection > Transaction Processing

This program displays all sample tests that were created using the **Inspection Test Design**¹ program and allows inspectors to update the tests assigned to them.

The following indicates areas in the product that may be affected by implementing this feature:

- The program has been enhanced with a print link in the Inspection detail pane (enabled once all tests are complete) that launches the relevant **WIP Quality Inspection Print**² or **PO Quality Inspection Print**³ print programs, and it can optionally display the Regulatory standards for the inspection.

¹Program name: SQMFRM

²Program: SQMPWI

³Program: SQMPPI

Report programs

WIP Quality Inspection Print

Program List > Quality Management > Documents

This program is used to generate and print **Certificate of Conformance (CoC)** and **Finished Goods Inspection Reports (FGIR)** for Work in Progress finished goods inspections.

PO Quality Inspection Print

Program List > Quality Management > Documents

This program lets you generate and print **Incoming Goods Inspection Reports (IGIR)** and **Certificate of Analysis (CoA)** for purchase order receipts inspections.

Lot Traceability Tracking Print

Program List > Quality Management > Documents

This program lets you generate and print the **Lot Traceability Tracking report (LTTR)** for a selected stock code and lot or serial number.

Query programs

Inspection Dashboard

Program List > Quality Management > Inspection

This dashboard program is used by quality managers to view inspection information, e.g. test results and inspection quantities.

The following indicates areas in the product that may be affected by implementing this feature:

- The program has been enhanced with a print link in the Inspection details pane (enabled only once all tests are completed) that launches the appropriate **WIP Quality Inspection Print¹** or **PO Quality Inspection Print²** print programs.

¹Program: SQMPWI

²Program: SQMPPI

Affected business objects

The following indicates the business objects that are affected by this feature:

Setup objects

Work Center Maintenance

The **WORK CENTER MAINTENANCE**¹ business object is used to add a new work center and to update or delete an existing work center.

Inventory Warehouse Maintenance

The **INVENTORY WAREHOUSE MAINTENANCE**² business object lets you add, maintain and delete warehouses.

Query objects

Lot Traceability Up & Down Query object

The **LOT TRACEABILITY UP & DOWN QUERY OBJECT**³ business object allows you to query lots.

¹Business object: BOMSWC

²Business object: INVSWH

³Business object: LOTQUD

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