Approval and Test Statuses

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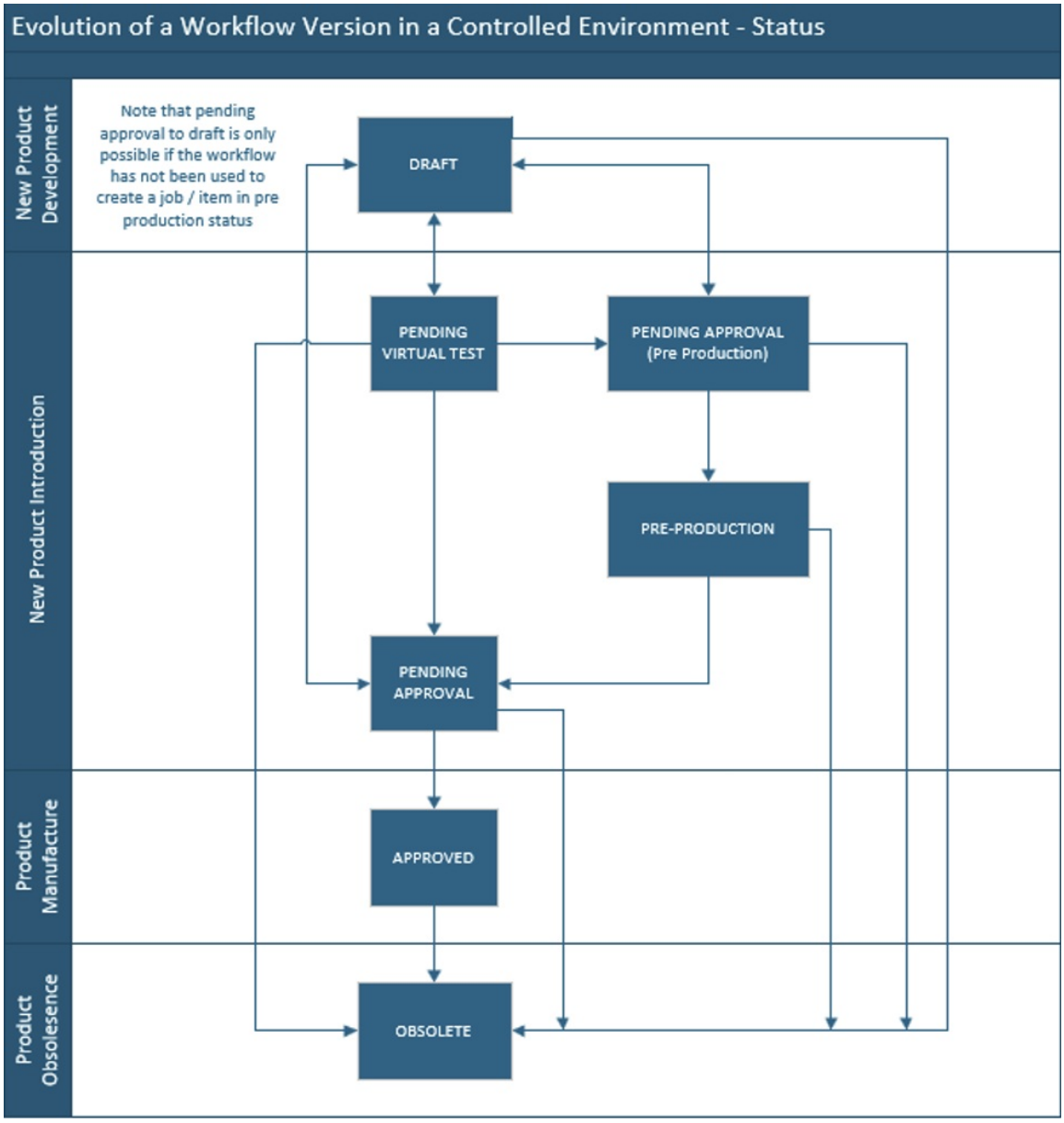
Approval and test statuses show the status of artifacts such as BoMs, Workflows, Recipes and checklists. The two test statuses are *Pre-production* and *Pending Virtual Test* which are also shared with Job and Material Items that may have test statuses. The statuses are:

- **Draft**
- **Pending Approval (Pre-production)**
- **Prod Approved**
- **Pre-production**: This status may only be used for pre-production jobs and by users with the appropriate test permissions. See section on Test statuses below.
- **Pending Virtual Test**: This status may only be used for virtual test jobs by users with the appropriate permissions. See section on Test statuses below.
- **Obsolete**: The artifact version can no longer be used. Note, that in the case of an obsoleted BOM version, it prevents the creation of new items based on that BoM version. However, existing items will continue to reference an obsolete BoM version and if in WIP, may be completed.

BoM and Workflow versions of a controlled type are created in draft status and then submitted for approval by changing to pending approval status. They must then be approved by a user with appropriate permissions which will change the status to approved before being used in production. Separate recipe approval will also be required. It is not possible to edit an approved version of a controlled BoM or Workflow without creating a new BoM or Workflow version.

The diagram below shows the permitted status changes for controlled workflows and BoMs.



BoM and Workflow versions of a non-controlled type may be created directly in approved status (by a user with appropriate permissions) without the need for separate approval. Some changes are permitted to approved versions of non-controlled BoMs and Workflows without up-versioning.

Test statuses

In regulated sectors you need to demonstrate strict control of design and process changes. We added **Pre-production** and **Pending Virtual Test** statuses to BoMs, Recipes, Workflows, Jobs and Material Items in the production system.

Usually, system changes are made in a test environment where you create a test configuration. After testing and if you are happy with the test configuration, you copy the configuration to the production environment where you approve it for use. The following issues exist with this method:

- Configurations must be done twice. Once in the test environment, and again in the production environment. This costs time and effort.
- When you copy from test to production, you might introduce errors.
- You have no evidence that the configuration was ever tested because the tests were performed in the test environment.
- When you test a physical process, you consume resources. When performed in a test environment, you don't see the consumption of resources.

Allowing you to mark configurations in your production system as test configurations, resolves all the issues listed above.

- You don't have to repeat configurations, so you save on the time and effort.
- You don't have to copy the test configuration to your production system, so you avoid the risk of introducing errors.
- You can record the evidence of the tests giving you an audit trail.
- You can model the real consumption of real resources.

Pre-production and *Pending Virtual Test* modes for BoM, Workflow, Recipes, Jobs and Material Items or lots can have a test status and only qualified people can work on test jobs and test items. For test jobs and test items, you may reference the test BoMs, Workflows and Recipes if you have the appropriate permissions to do so. These statuses allow items subject to these processes to be tracked in the system.

Pre-production

This status may only be used for pre-production jobs and by users with the appropriate permissions. Items in *Pre-production* will not be released into good stock when completed but will be set to *on-Hold*. Manual intervention is required to release pre-production items.

Pre-production jobs represent actual activity on the shopfloor and may consume any inventory and will appear in any plan.

Pending Virtual Test

This status may only be used for virtual test jobs by users with the appropriate permissions. Items in *Pending Virtual Test* will not be released but put *on-Hold* when completed.

Virtual Test jobs are for testing configuration and are not physically executed on the shopfloor. Virtual Test jobs may only consume material with virtual test status.