Check Item Templates

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A check item template is something that can be checked against any product of that type and it can be referenced on one or more checklists.

Template Types

A check item template can be one of three types:

1. Attribute: Attributes are the presence of defects either as a pass/fail or as a count of failures.
2. Text: This allows for free text input (including numbers) or an option list of text items.
3. Variable: This allows for entering a numeric value with upper and lower limits.

To create check item templates navigate to the **Checklists** page and click the **Check Item Templates** button. The **Check Item Templates** page is subdivided into *Attribute*, *Text* and *Variable* sections.

Attribute Template

1. Click the **New** button in the **Attribute** section to display the **New Check Item Template** input screen.
2. Complete the **New/Edit Check Item Template** input screen.

New/Edit Check Item Template - Attributes input screen

The following properties can be defined:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Name of the attribute that is going to pass or fail.
- **Type**: *Attribute* would be prepopulated.
- **Prompt***: Words that are displayed to prompt the operator to answer accurately.
- **Input Control Type***: The choices in this field for an *Attribute* type template:
  - **Check Box**:
    - Checked should mean *Pass, Good, Acceptable* or any other positive response to the prompt.
    - Unchecked should mean *Fail, Bad, Unacceptable* or any other negative response to the prompt.
  - **Numeric:** Required for when you want to record a count of failures or defects but you don't want it measured against specification limits as is required for a variable template. For example, to record the number of failed samples.
  - **Option List**: Selecting this control type will display two additional fields:
    - **Pass Text**: Text that is displayed in an event of a pass.
    - **Fail Text**: Text that is displayed in the event of a fail.
- **Product Type***: Products of the types selected can be checked for this check item. An unlimited number of product types can be selected.
- **Critical***: Is this property critical? Options: *Yes*, *No (default)*. This flags that this is a critical property. It must not be confused with whether the check item is compulsory. You set a check item as compulsory when you create the checklist step.
- **Active**: Is this check item active? Options: *Yes (default)*, *No*. Check item templates can be deactivated when they are no longer valid.
- **Controlled***: Is this check item controlled? Options: *Yes, No (default)*.

- **eSign Permission**: The template can be used for many products. This permission allows you to change the product specification for a specific product if required. If left blank, the product specifications can be changed without an e-signature.
- **Default Specification**:
    - **Criteria Text**: The default criteria text, there to help give the operator additional guidance on how to determine a pass vs fail. Suggestion is to use this only if all or the majority of products within the type specified share a common criteria (note that this can be overwritten in individual product specifications if needed).

      Note: Special characters (e.g. < >) are not allowed in the criteria text.

Text Template

Text check item templates are used to collect data that is not a measurement or a count of defects. For example, you may want to collect a date code, or a program number. The input control for a text template can be either free text where a user types into the field, or an option list, where a user selects from a predefined list.

1. Click the **New** button in the **Text** section to display the **New Check Item Template** input screen.

2. Complete the **New/Edit Check Item Template** input screen.

New/Edit Check Item Template - Attributes input screen

The following properties can be defined:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Name of the text check item.
- **Type**: *Text* would be prepopulated.
- **Prompt***: This is the default prompt given to the operator doing the check. Note that this can be overwritten in each individual check list step.
- **Input Control Type***: Options:
    - **Free Text**: An operator can type into the field.
    - **Option List***: This field is displayed when *Option List* is selected in the **Input Control Type** field. It is the primary control type for collecting text product characteristics. Select the predefined list from the **Option List** dropdown. For more information, see the Create Option List for a Text Template section.
- **Product Type***: Products of the types selected can be checked for this check item. An unlimited number of product types can be selected.
- **Critical***: Is this property critical? Options: *Yes*, *No (default)*. This flags that this is a critical property. It must not be confused with whether the check item is compulsory. You set a check item as compulsory when you create the checklist step.
- **Active**: Specifies if this check item is active. *Yes* is prepopulated.
- **Controlled***: Is this check item controlled? Options: *Yes, No (default)*.
- **eSign Permission**: The template can be used for many products. This permission gives you permission to change the product specification for a specific product if required. If left blank, the product specifications can be changed without an e-signature.
- **Default Specification**:
    - **Criteria Text**: The default criteria text, there to help give the operator additional guidance on how to determine a pass vs fail. Suggestion is to use this only if all or a majority of products within the type specified share a common criteria (note that this can be overwritten in individual product specifications if needed).

      Note: Special characters (e.g. < >) are not allowed in the criteria text

Create an Option List for a Text template

1. Click the **New** button in the **Text** section to display the **New Check Item Template** input screen.

2. In the **Text** section, click the **Option Lists** button.

3. Click the **New** button to display the **New Option List** popup.

4. Complete the **New Option List** input screen.

New/Edit Option List - Text input screen

The following properties can be defined:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Name of the characteristic that needs a text response. This is most often used in grading, sorting, evaluating product characteristics that are not numeric.
- **Description**: Description of the option list.
- **Item Source***: Source of the items. Options:
    - User Defined: Options are "hard coded" manually.
        - Value Data Type: The data type of the item source. Options: *Numeric, Text.* Select *Items* to define the Value Data Type. See the Option List Items section for how to do this.
- SQL Statement: Options are generated from a SQL statement .

Option List Items

1. Navigate to the **Text** section of the **Check Item Template** screen.

2. Select the *Text* check item and click the **Option Lists** button.

3. Select the user defined option that contains *Numeric* or *Text* data type.

4. Click the **Items** button and then click the **New** button.

5. In the **New Item** input screen, provide a name and value for each option in the list. Note that it is only the value hat a user sees in the dropdown list in the workstation.

Variable Template

Characteristics of a product are often measurements, e.g., dimensions, weight, torque. For these characteristics, you need to use a variable type of check item template.

As operators are entering numeric information on the shopfloor it is important to be clear on the unit of measure and the accuracy required. For this reason, it is recommended to specify the decimal places required and the unit of measure for the data entered.

The input control for a **Variables** template can only be numeric.

New/Edit Variable template

1. Click the **New** button in the **Variable** section to display the **New Check Item Template** input screen.

2. Complete the **New/Edit Check Item Template** input screen.

New/Edit Check Item Template - Variables input screen

The following properties can be defined:

Blue fields in the form are required and are flagged with an asterisk (*) in this document.

- **Name***: Name of the characteristic that is going to pass or fail.
- **Type**: *Attribute* would be prepopulated.
- **Prompt***: Provide a prompt to assist a user who is completing the checklist.
- **Input Control Type***: The choice in this field is for a *Variable* type template. Value: *Numeric*.

- **Product Type***: Products of the types selected can be checked for this check item. An unlimited number of product types can be selected. Product types can be Assigned/Unassigned at any time. For more information, see Product Types.
- **Decimal Places**: Number of decimal places.
- **Unit**: Unit of measure.
- **Critical***: Is this property critical? Options are *Yes*, *No (default)*. This flags that this is a critical property. It must not be confused with whether the check item is compulsory. You set a check item as compulsory when you create the checklist step.
- **Active**: Specifies if this check item is active. Options *Yes (default)*, *No*.
- **Controlled***: Is this check item controlled? Options: *Yes, No (default)*.
- **eSign Permission**: The template can be used for many products. This permission gives you permission to change the product specification for a specific product if required. If left blank, all permissions can change the product specification for products using this template.
- **Default Specification:** Note that after creating the variable check item, the default specification can be changed via the **Product Specification** screen.
    - **Absolute Max**: Used as a basic validation of the data entered by the operator to ensure that they haven't got the incorrect UOM. For example, g vs kg, m vs cm. The system will not block you inputting higher values, but is used for statistical process control (SPC) calculations.
    - **Upper Spec Limit**: Values between the lower and upper limits are considered within tolerance.
    - **Target Value**: The target value.
    - **Lower Spec Limit**: Values between the lower and upper limits are considered within tolerance.
    - **Absolute Min**: Used as a basic validation of the data entered by the operator to ensure that they haven't got the incorrect UOM. For example, g vs kg, m vs cm. The system will not block you inputting lower values, but is used for SPC.

Warning

When you create a new variable check item template (or a new product of the specified type), the default specifications are copied to every product of that type. If these targets and tolerances are only valid for a few products of that type, you risk incorrect specifications for all the other products. Use default targets, USL, and LSL only if you have controls to ensure correct specifications for all products of that type.

Product Types

Each check item template applies to one or more product types. When a checklist is set up for a product the check item templates available for each checklist step is restricted by the templates associated with the product's product type.

Product types can be assigned when creating the check item template, or at any later time as follows:

1. Navigate to the **Check Item Template** screen.
2. Select a check item from one of the three types (Attribute, Text, Variable).
3. Click the **Product Types** button and *Assign/Unassign* product types against the selected check item template.

Product Specification

The product specification can be accessed from a selected check item or from an product's page. Accessing it via a check item lists all the products that use the check item in a checklist. The specifications for a product can be edited from the **Product Specifications** screen. For more information, see the Link to the Product Specifications documentation.

Where Used

Click the **Where Used** button to display all the checklists that use the check item. You can click a checklist and open its steps

from the **Check Item Where Used** page.

Revision History

A revision history keeps record of changes that were made to a check item.

Set Inactive

A check item can be set to inactive if it is not being used in a checklist. An inactive check item cannot be assigned to a checklist. Inactive items can be set to back to active at any time. You can't delete a check item if it is referenced by a check step in any version of checklist.