

# Creating a First Article QC Template



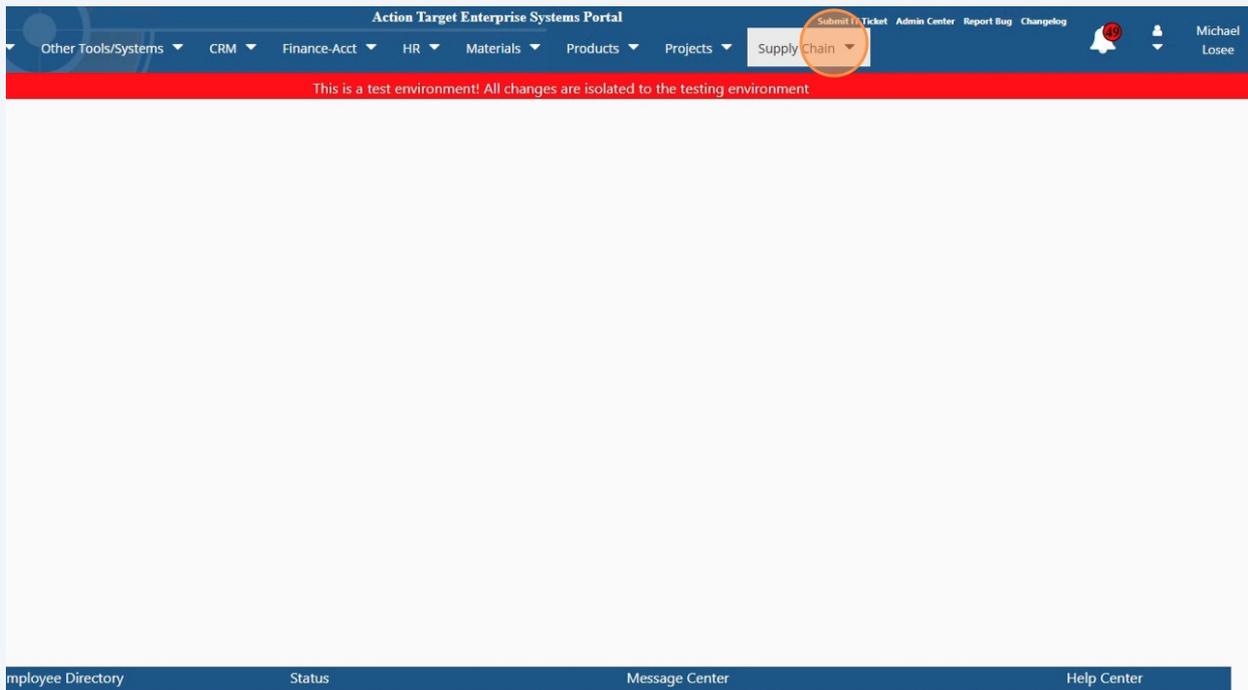
1 Navigate to the Action Target Enterprise Portal.

Employee Name

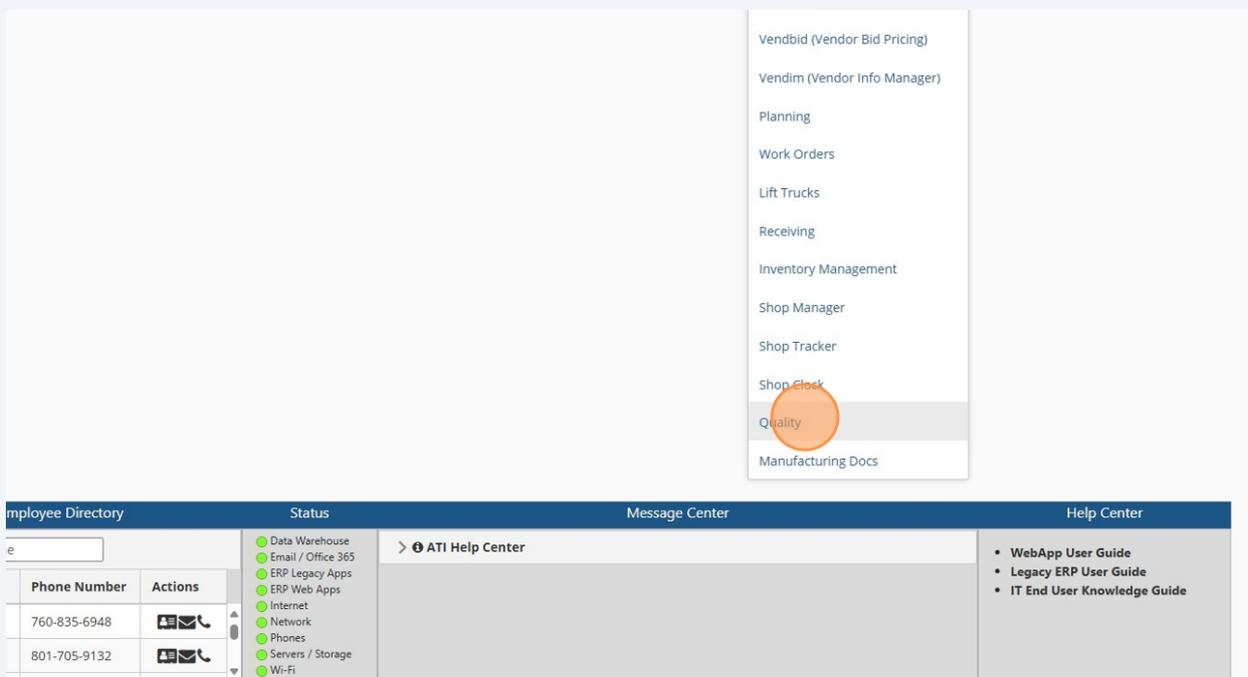
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Employee Directory			Status	Message Center	Help Center
Employee Name			<ul style="list-style-type: none"><li>Data Warehouse</li><li>Email / Office 365</li><li>ERP Legacy Apps</li><li>ERP Web Apps</li><li>Internet</li></ul>	> ATI Help Center	<ul style="list-style-type: none"><li>WebApp User Guide</li><li>Legacy ERP User Guide</li><li>IT End User Knowledge Guide</li></ul>
Employee Name	Phone Number	Actions			

2 Click on the Supply Chain Tab located near the top of the screen.



3 Click on the "Quality" option from the drop-down menu.



4 Click on the "QC Setup" tab at the top of the tool.

Quality

Quality Table View Refresh Search Edit New

ID	Submitted Date	Submitted By	CAPA comp	CAPA
1	2022-05-23 7:04 AM	2922	false	
2	2022-05-23 7:23 AM	1900	false	
3	2022-05-23 8:27 AM	2937	false	
4	2022-05-23 9:49 AM	1654	false	
5	2022-05-23 10:39 AM	1017	false	
6	2022-05-23 2:05 PM	2922	false	
7	2022-05-23 5:49 PM	2943	false	
8	2022-05-24 10:00 AM	2320	false	
9	2022-05-24 10:59 AM	1017	false	
10	2022-05-24 11:12 AM	2320	false	

5 In the QC Templates list header click the "Add" button.

Quality Control Setup Settings Preview Template

QC Templates Refresh Add Edit Delete Clone Status Actions Activate Deactivate

Title	Notes	Custom	First Article	Created By	Created Date	Status
First Article	Use for all	false	false	mhill	2025-06-04 5:06	active
QS-00725		false	false	mhill	2024-11-06 4:20	inactive
QA Hold - V	Use to put	false	false	mhill	2024-10-25 8:20	active
QS-00543_	Standard li	false	false	mhill	2024-10-16 4:11	active
QS-00541_		false	false	seller	2024-09-20 7:34	active
QS-00720_		false	false	seller	2024-09-20 7:11	inactive
QS-00577_		false	false	seller	2024-09-19 2:02	inactive
QS-00578_		false	false	seller	2024-09-19 1:43	inactive
QS-00660_		false	false	mhill	2024-09-19 9:32	inactive
Z_Laser Fir	Obsolete D	false	false	mhill	2024-09-06 12:4	inactive

QC Template Links Refresh Add Edit Delete

QC Tracked Data Refresh Add Edit Delete Reorder

6

Type in the QC template title and notes. Check the First Article Box. Then press the "Create" button.

The screenshot shows the 'Quality Control Setup' interface. A 'Create QC Template' dialog box is open, allowing the user to create a new template. The dialog contains the following fields and options:

- Title:** Testing
- Notes:** (Empty text area)
- Custom:**
- First Article:**
- Create:** (Highlighted button)

The background interface shows a table of existing QC Templates with columns: Title, Notes, Custom, First Article, Created By, Created Date, and Status. Below the table are sections for 'QC Tracked Data', 'QC Blocks', and 'QC Block Items', all of which currently show 'No data loaded'.

7

Select your newly created template from the QC Templates List.

The screenshot shows the 'Quality Control Setup' interface with the 'QC Templates' list. The 'Testing' template is highlighted with an orange circle. The list has the following columns: Title, Notes, Custom, First Article, Created By, Created Date, and Status.

Title	Notes	Custom	First Article	Created By	Created Date	Status
Testing		false	true	mlosee	2025-07-03 10:2	inactive

The interface also includes a navigation menu at the top with options like Legacy ERP, CRM, Finance-Acct, HR, Materials, Products, Projects, and Supply Chain. A red banner indicates 'This is a test environment! All changes are isolated to the testing environment'. Below the QC Templates list are sections for 'QC Tracked Data', 'QC Blocks', 'QC Block Items', and 'MOs', all showing 'No data loaded'.

8 Click the "Add" button in the QC Template Links list Header.

The screenshot shows the 'QC Setup' page in the Action Target Enterprise Systems Portal. The page has a blue header with navigation menus and a red banner stating 'This is a test environment! All changes are isolated to the testing environment'. Below the banner, there are tabs for 'QC Setup' and 'QC Data'. The main content area is titled 'Control Setup' and contains several sections: 'Status Actions' with buttons for 'Refresh', 'Add', 'Edit', 'Delete', 'Clone', 'Activate', and 'Deactivate'; 'QC Template Links' with buttons for 'Refresh', 'Add', 'Edit', and 'Delete'; a table with columns 'Operation', 'Base Name', 'Part ID', 'Part Rev', 'Part Description', 'Created By', and 'Created Date'; 'QC Block Items' with buttons for 'Refresh', 'Add', 'Edit', 'Delete', and 'Reorder'; and a table with columns 'Order', 'Parameter', 'Target Value', 'Data', 'Pass/Fail', 'Verify', 'Multiple Rows', and 'Required'. The 'Add' button in the 'QC Template Links' header is circled in orange.

9 Select at what operation you would like the QC Template to be applied to.

The screenshot shows the 'QC Setup' page with the 'Edit QC Template Link' dialog box open. The dialog box has a title bar 'Edit QC Template Link' and a close button. It contains four input fields: 'Operation' (with a dropdown arrow), 'Base Name', 'Part ID', and 'Part Rev'. A blue 'Create' button is at the bottom of the dialog. The 'Operation' dropdown menu is highlighted with an orange circle. The background shows the same 'QC Setup' page as in the previous screenshot, but with a greyed-out appearance.

10

Input the part that you would like the template to be applied too, in the Part ID field.

The screenshot shows the 'Quality Control Setup' interface. A dialog box titled 'Edit QC Template Link' is open, with the 'Part ID' field highlighted by an orange circle. A dropdown menu is open below the field, showing a list of parts. The first item, '1234 Dlx-90 MAC Valve', is highlighted in blue. Other items in the list include '12344 PT Pelvic Hit Zone Target Plate', '12342 PT Pelvic Hit Zone Mounting Bracket', '12343 PT Pelvic Hit Zone Boxed', '12348 (Obsolete) Hex buffer open drain surface mount', and '12349 Carriage bolt'. The background interface shows various sections like 'QC Templates', 'QC Template Links', 'QC Tracked Data', 'QC Blocks', and 'QC Os' with their respective data tables and action buttons.



You can also use the base name as the ID to link the template.

11 Place the revision number of the part in the Part Rev box.

The screenshot shows the 'Quality Control Setup' interface. A modal dialog titled 'Edit QC Template Link' is open. The dialog contains the following fields:

- Operation: elec-assembly (dropdown)
- Base Name: (empty text field)
- Part ID: 1234 (text field)
- Part Rev: (empty text field, highlighted with an orange circle)

A blue 'Create' button is located at the bottom of the dialog. The background interface shows various tables for QC Templates, QC Tracked Data, QC Blocks, and MOs, all of which are currently empty.

12 Click the "Create" button.

This screenshot is identical to the previous one, showing the 'Edit QC Template Link' dialog box. In this step, the blue 'Create' button at the bottom of the dialog is highlighted with an orange circle, indicating the next action to be taken.