

CLIENT PROCEDURE FOR UPDATING EDI TABLES

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APPROVAL TABLE

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APP	gdixson@solabs.com (Gretchen Dixson), N/A	gdixson@solabs.com (Gretchen Dixson)	Originator (Author)	2021-11-09 17:13:14 UTC-05:00

¹ Legend:

NS: Not Started

AWA: Awaiting Approval

APP: Approved

REJ: Rejected

STO: Stopped

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Client Procedure for Updating EDI Tables

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1 PURPOSE

The purpose of this document is to provide clear instructions to client as of how to transmit EDI list of values to the SOLABS team.

The information in this document is oriented for SOLABS QM APPs, but the same instructions can be used to request an update of your EDI tables related to the Core Software.

2 CONTEXT

SOLABS relies on Electronic Data Interchange (EDI) tables for populating certain fields in the application. The usefulness of that technology is that the values displayed in those specific fields are dynamic. A selection in one field affects the available values for the second field.

2.1 END-USER EXPERIENCE WITH EDI RELATED FIELDS

As an example, present in many QM APP, these three (3) fields are related to an EDI table: Material Type, Strength/Dose and Packaging Configuration. In other words, the values displayed in those fields are picked from a list of values given in the EDI table.

Here are those three (3) fields picked as example.



A screenshot showing three vertically stacked dropdown menus. The first is labeled '* Material Type:' and contains a single option '-----'. The second is labeled '* Strength/Dose:' and also contains a single option '-----'. The third is labeled '* Packaging Configuration:' and contains a single option '-----'. Each dropdown has a small downward arrow on the right side.

The list of values displayed in the field **Strength/Dose** and **Packaging Configuration** relies on the selection made in the field **Material Type**. When no selection is done for **Material Type**, the two (2) following dropdown fields are empty.



A screenshot showing three vertically stacked dropdown menus. The first is labeled '* Material Type:' and contains a single option '-----'. The second is labeled '* Strength/Dose:' and is empty, with a blue highlight at the bottom. The third is labeled '* Packaging Configuration:' and is also empty, with a blue highlight at the bottom. Each dropdown has a small downward arrow on the right side.

When a selection is done for **Material Type**, the two (2) following dropdown fields will then display values related to this prior selection. Hence, if a different selection was made for **Material Type**, the values in the two (2) dropdown fields would then be different.

* Material Type:

Material Type Value #1

* Strength/Dose:

Strength/Dose value #1 associated to Material Type value #1
Strength/Dose value #2 associated to Material Type value #1
Strength/Dose value #3 associated to Material Type value #1

* Packaging Configuration:

Packaging value #1 associated to Material Type value #1
Packaging value #2 associated to Material Type value #1
Packaging value #3 associated to Material Type value #1

2.2 BEHIND THE SCENES

The values of such fields, related to EDI tables, are defined by clients based on their business reality. Different clients have different products, components, processes, etc.

Clients will be asked to decide and define the values that are needed to be displayed in those fields. This exercise will be done before the implementation of a new QM APP and each time new values must be added or removed.

It is important to understand that one EDI table can be used to feed multiples fields in different QM APPs. Therefore, when a change is done to the EDI table it will be reflected in all related fields used in the different QM APPs.

Once the exercise of defining values is completed internally, clients will have to transmit the information to the SOLABS support team.

The following Work Instruction describes this procedure.

3 WORK INSTRUCTION

To provide the correct information with which to populate your EDI tables, i.e., your field values related to those EDI tables, please follow those instructions.

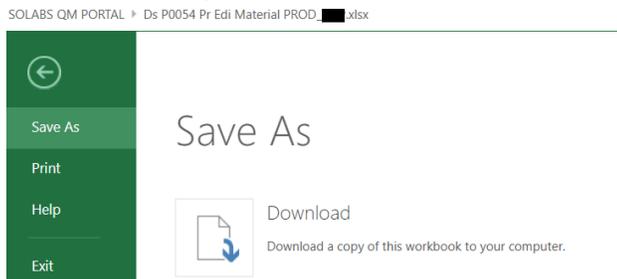
1. In SOLABS QM10, note the QM APP and the fields for which you would like the values updated.
 ex: QM APP **Deviation**; fields **Material Type**, **Strength/Dose** and **Packaging Configuration**.
2. If this is your first or second request for change → Confirm those are EDI related fields.
 - a. Access the requirement document of the QM APP (UFDS)
 For Off-the-shelf (OTS) QM APP, the UFDS can be find in the eRoom, under the *Public* > *QM APP – OTS* folder.
 - b. Search for those field names. Ex : Ctrl+F **Material Type**
 - c. If the field is related to an EDI table list, note the **EDI table** and **column** names.

ex:

F.01.21.1	Material Type	is a customizable Single Select that refers to the client specific EDI table PR_EDM_Material, column type
F.01.21.2	Material Type	is mandatory
F.01.22.1	Strength/Dose	is a customizable single select that refers to the client specific EDI table PR_EDM_Material, column strength
F.01.22.2	Strength/Dose	is mandatory
F.01.23.1	Packaging Configuration	is a customizable Single Select that refers to the client specific EDI table PR_EDM_Material, column packagingConfiguration

*If the fields are not related to an EDI table, the values can be updated directly in SOLABS QM10 through the **SETUP** section > Administration > Custom Lists.*

3. Download the desired EDI table.
 - a. The EDI tables can be found in your SharePoint Reporting Portal under SOLABS QM Reports > QM APPs Datasets > [QM APP process name].
 - b. It is named with the previously noted **EDI table** name.
 - c. Once the EDI table is located, open and download a copy.



* If the process is only installed in your Validation environment, the table will only be available under the VAL Reports in SharePoint.

** If the EDI table is not present, please contact the SOLABS support team with all above information related to your request.

4. Fill out the EDI table with the values you need.
 - a. Open the EDI table with Excel.
 - b. Locate the column name previously noted for each field. Those will be the relevant columns for your task.
 - c. Enter the desired values.

If it is the first time you fill out the table, follow those guidelines:

- For SOLABS to have the complete information, you must fill each line completely.
- Start with the first relevant column (related to field) and indicate all possible values. Ex:

type	strength	packagingConfiguration
Material Type value #1		
Material Type value #2		
Material Type value #3		

- For each value of the first column, list all applicable values in the second column.
- Create an additional line for all the values needed for one specific value of the first column. Ex:

type	strength	packagingConfiguration
Material Type value #1	Strength A	
Material Type value #1	Strength B	
Material Type value #1	Strength C	
Material Type value #1	Strength D	
Material Type value #1	N/A	
Material Type value #2	...	
Material Type value #3	...	

- For each value of the second column, list all applicable values in the third column.
- Create an additional line for all the values needed for one specific value of the second column. Ex:

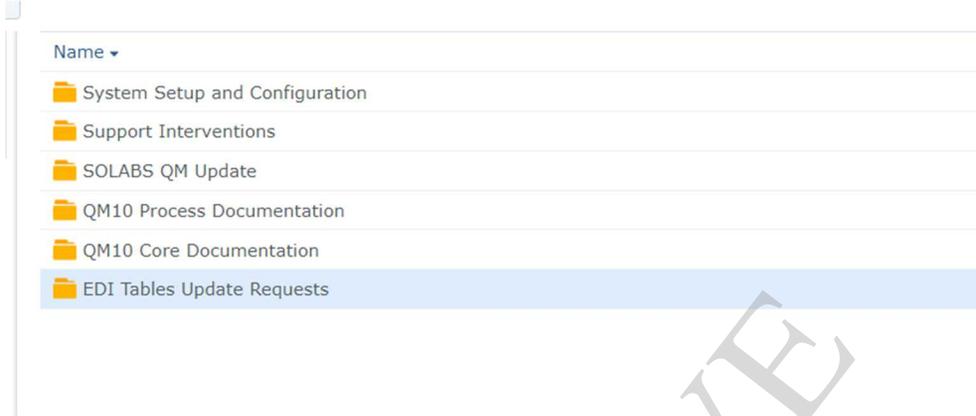
type	strength	packagingConfiguration
Material Type value #1	Strength A	Packaging #1
Material Type value #1	Strength A	Packaging #2
Material Type value #1	Strength B	Packaging #1
Material Type value #1	Strength B	Packaging #2
Material Type value #1	Strength B	Packaging #3
Material Type value #1	Strength B	N/A
Material Type value #1	Strength C	...
Material Type value #1	Strength D	...
Material Type value #1	N/A	...
Material Type value #2
Material Type value #3

- Continue in this logic. Most EDI tables only have two (2) or three (3) relevant columns.

If this is not the first time you provide values to SOLABS, please highlight the changes (addition, removal, modifications) in yellow. This will help us narrow down the comparison with your previous values.

5. Once done, add the date to the file name as following:
 [original file name]_[Clientname]_DD_MMM_YYYY

6. Go to your **eRoom** site and upload the file save with the date in the file name in the folder named: **EDI Tables Update Requests:**



Please create this folder if it does not already exist.

7. Send information to the SOLABS Support team.
Send an email to support@solabs.com to request an update of your EDI table.
Indicate the location of the file in your eRoom site.
Indicate if you want this update to affect your Validation and/or Production environment.

4 ABBREVIATION

Abbreviation	Definition
EDI	Electronic Data Interchange
UFDS	User Functional and Design Specifications

5 DEFINITIONS

N/A

6 REFERENCE DOCUMENTS

N/A

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7 VERSION HISTORY

Version	Date	Authors	Changes
1.0	20-Feb-2021	Sophie Chapdelaine	First issue
2.0	9-Nov-2021	Gretchen Dixson	Update to align with current SOLABS Dictionary terminology.

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