

Oracle Quality Vendor Document List (VDL) Vendor User Manual

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[Oracle Quality Vendor Document List \(VDL\) Process APM-OFE-GLO-QUA-016](#)



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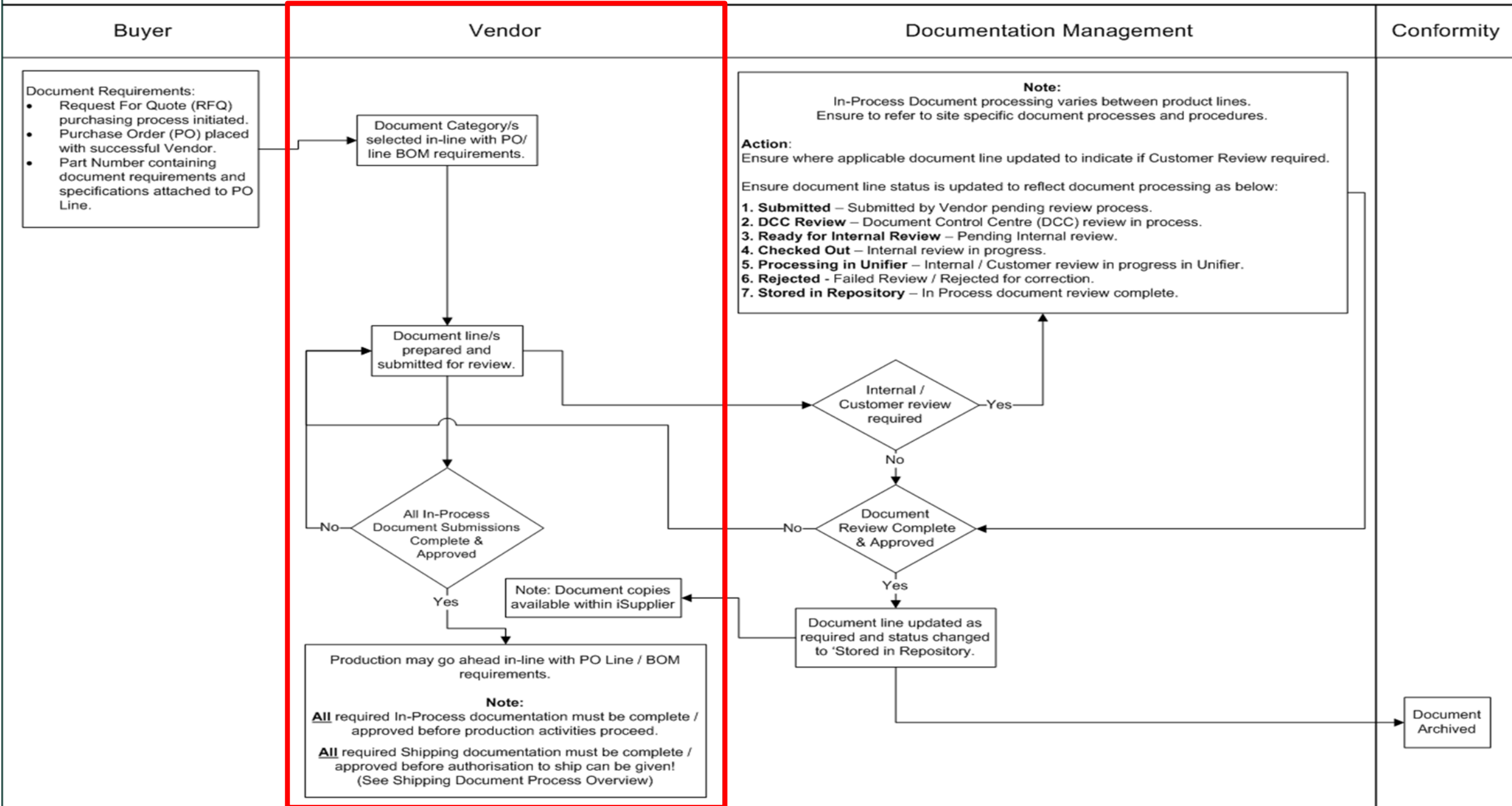
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Acronyms and definitions to remember

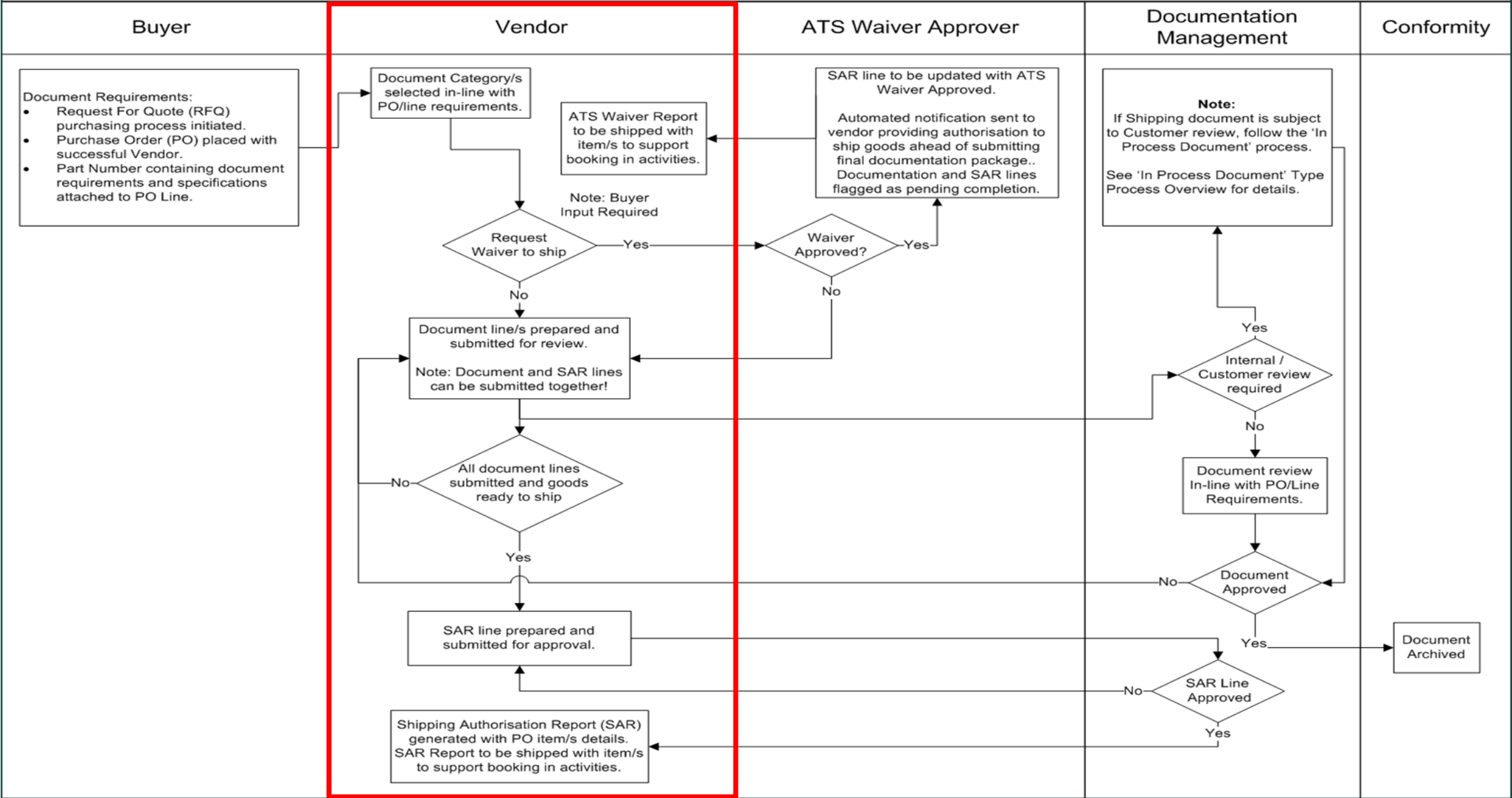
Acronyms	Definition	
PO#	Purchase Order Number	Oracle generated purchase order number.
PO Line#	Purchase Order Line Number	Oracle Generated PO Line number.
BOM	Bill of Material	List of the parts and assemblies and the quantities required to produce an end product.
VDL	Vendor Document List	Oracle solution used to manage vendor documentation flow.
DB	Data Base Sequence	Oracle created unique number used within VDL solution.
SAR	Shipping Authorisation Report	Report created and emailed to Vendor when an SAR and Document lines are approved.
In Process Doc	In Process Document Type	In-Process Documents are documents for purchased assemblies such as Hydraulic Schematics and Health and Safety Plans that are subject to extra approval processing via engineering and in some cases customers usually ahead of production activities starting.
Shipping Doc	Shipping Document Type	Shipping Documents are documents for off shelf purchased items such as Certificate of Conformity (COC), Lift Certs. and completed Manufacturing Record Books (MRB's) etc.
Source Inspected	Source Inspection requirement	Requirement for inspection to be performed at the vendor site by third party / customer.
Batch (Trace)	Batch trace control	Batch (Lot) numbers are unique identifiers assigned to a batch of items to support tracking through supply chain systems and support quality management processes.
Serial (Trace)	Serial trace control	Serial numbers are unique identifiers assigned to each individual item to support tracking through supply chain systems and support quality management processes.
URL	Uniform Resource Locator	URL is a string of characters that unambiguously identifies a particular resource.
ATS	Authorisation To Ship	Oracle solution to request and provide Authorisation To Ship.
ATS Waiver	Authorisation To Ship Waiver Request	Process used by Vendor/Buyer to request waiver to ship goods ahead of quality documentation requirements being met.
DC	Document Controller	Role responsible for processing quality documents.
DCC	Document Control Centre	Documentation Management group / team / system where document QA is performed.

Process overview & key responsibilities

'In-Process Document Type' Process Overview



'Shipping Document Type' Process Overview



Key responsibilities

Document Categories

The Vendors are responsible for selecting and submitting document categories in-line with the PO Line & Bill of Material (BOM) requirements.

Document Types (Shipping & In Process)

The Vendors are responsible for selecting the correct document types in-line with the PO Line & BOM requirements.

Document Requirements

The Vendors are responsible for uploading and submitting documents that comply with the PO Line & BOM requirements.

Key responsibilities

Authorisation to Ship

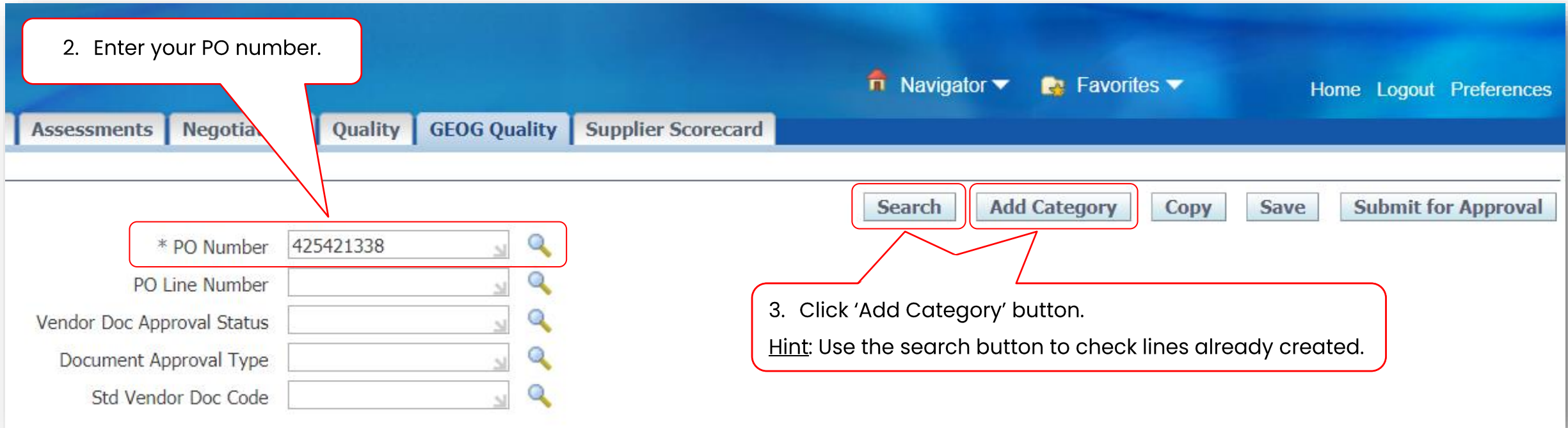
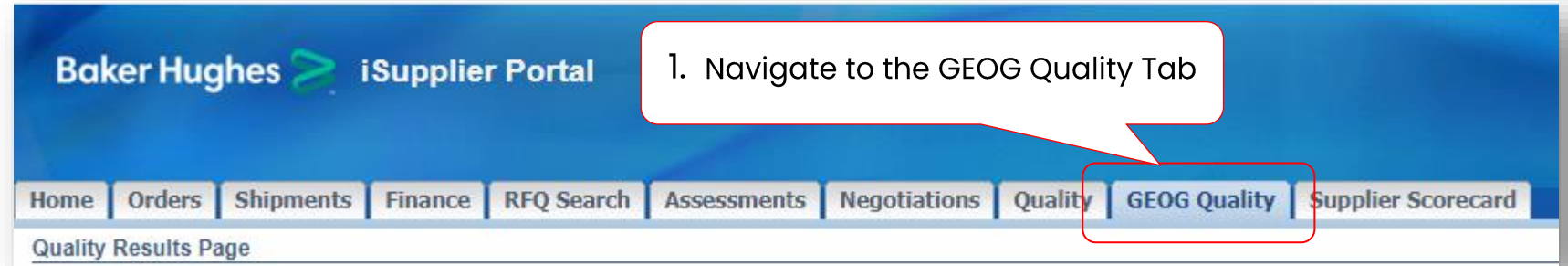
The Vendors are responsible for updating/submitted SAR lines in-line with the PO Line & BOM requirements.

Authorisation to Ship Waiver

The Vendors are responsible for initiating ATS Waiver requests to Buyers.
The Buyers are responsible for processing the initiated Waiver requests.

How to select a document category

How to select a document category



Selecting document categories – Cont.

4. Select the applicable PO line/s

Hint: More than one PO Line can be selected at the same time.

You will see PO line status should any documents already be in progress.

PO Number **445602108**
PO Line Number
Document Approval Type
Vendor Document Code
Document Description

5. Search Document Types

Select All | Select None

Select	Line Number	DB Sequence	Quantity Applied To Shipment	Quantity	Status	Status Date
<input checked="" type="checkbox"/>	2		2			
<input checked="" type="checkbox"/>	4		2			

8. Add More document categories or if done, go back to the Search page.

7. Click 'Add Category'

6. Select Document Type/s.

Hint: More than one document type can be select at the same time.

Select All | Select None

Select	Doc. Approval Type	Std. Vendor Document Code	Document Description
<input checked="" type="checkbox"/>	Shipping	Certificates Lift Load Cert	Lifting/Load Test Certificate
<input type="checkbox"/>	In Process		Lifting Certificate
<input type="checkbox"/>	In Process		Lift Balance Certificate
<input type="checkbox"/>	In Process		Lifting Equipment General Arrangements

Selecting document categories – End.

 Confirmation

Request has been submitted for the addition of the 1 documents and will be processed in next 5 minutes.

9. You will receive message confirming document categories have been added and will be available for upload in a few minutes.






How to upload a document

How to upload a document

Quality Results Page

1. Enter your PO number.

Hint: For PO's with multiple lines add the PO Line # to narrow the search


* PO Number 
PO Line Number 
Vendor Doc Approval Status 
Document Approval Type 
Std Vendor Doc Code 

Search

Add Category







2. Click 'Search'

Quality Results

 **TIP** Please ensure to select all the considered lines before saving.

Select All | Select None

3. Click the add Attachment Icon on the Document Line

Select	Details	PO Number	PO Line Number	Part Number	DB Sequence	* Source Inspected ?	Vendor Doc Approval Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Document Submission Date	Stand Vendor Doc Code	Stand Vendor Description
<input type="checkbox"/>	+ Show	425421338	1	A451829-108	3125530	<input type="text" value="No"/>	 						Certificates Lift Load Cert	Lifting/Load Test Certificate
<input type="checkbox"/>	+ Show	425421338	1	A451829-108	3125530	<input type="text" value="No"/>	 	<input type="checkbox"/>					SAR	Authorisation to Ship

Uploading documents – Cont.

Add Attachment

Add Desktop File/ Text/ URL ▾

Attachment Summary Information

Title	CoC-425421338-1-1-RevA
Description	Load test cert

5. Select Type 'File' and Click 'Choose File' button

Define Attachment

Type File URL Text

Choose File No file chosen

4. Enter attachment Title and Description.

Note: Ensure to include document version within the title and file name e.g.

CoC-425421338-1-1-RevA



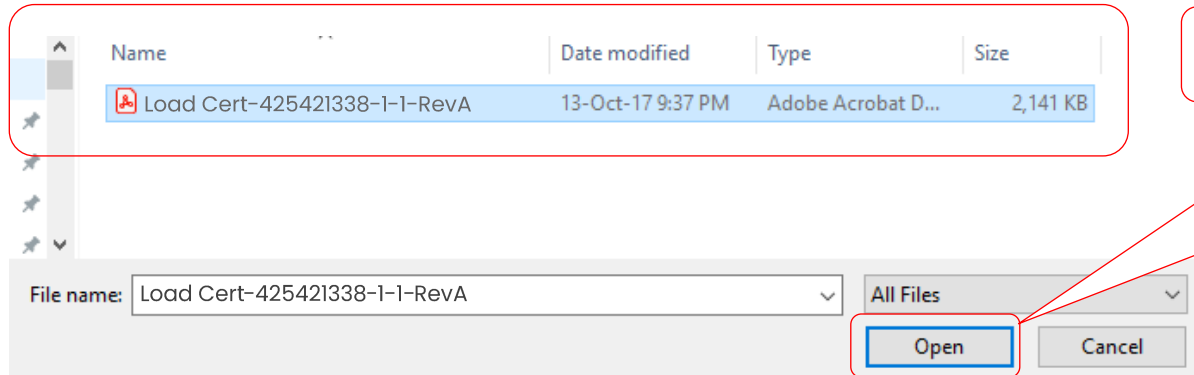
****Important****

Hints:

- Ensure to give the attachment an obvious title.
- Ensure file types are not locked to prevent review.
- There are three attachment types:
 - File – Primary choice
 - URL – Add URL
 - Text – Enter text

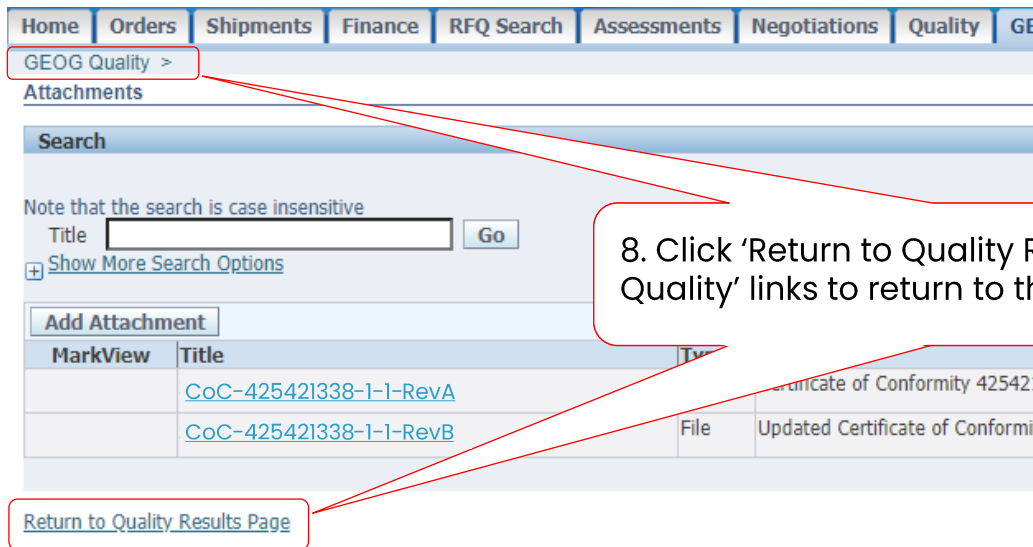
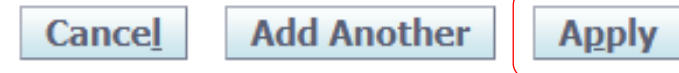
• **Note: File size upload limit is 100mb!**

Uploading documents - Cont.



6. Select the file to be uploaded and Click 'Open' button.

7. Click 'Apply' button.












8. Click 'Return to Quality Results Page' or 'GEOG Quality' links to return to the search page.

Uploading documents - End.

e saving.

9. You will now see the file icon displayed next to the attachment icon.

* Source Inspected ?	Doc Approval Status	ATS Waiver Request	Waiver Approval Status	Approval Date	Attachments	Document Submission Date	Stand Vendor Doc Code	Stand Vendor Description	Doc Applied to S Quantity
No	 				 		Certificates Lift Load Cert	Lifting/Load Test Certificate	
No	 	<input type="checkbox"/>					SAR	Authorisation to Ship	1 

Uploading documents – Copy feature

1. Should the attachment relate to more than one document line, use the copy feature to save time! Check the line you have uploaded the document and the lines you wish to copy to.

2. Click the 'Copy' button

Search Add Category Copy Save Submit for Approval

<input checked="" type="checkbox"/>	+ Show	445608082 2	A130076- 3136460	No	Submitted					11-Jan-21	Certificates COC	Certificate of Conformance	i
<input type="checkbox"/>	+ Show	445608082 2	A130076- 3136460	No	Submitted	<input type="checkbox"/>				11-Jan-21	SAR	Authorisation to Ship	5 i
<input checked="" type="checkbox"/>	+ Show	445608082 3	H110099 3136462	No	i i						Certificates COC	Certificate of Conformance	i
<input type="checkbox"/>	+ Show	445608082 3	H110099 3136462	No	i i	<input type="checkbox"/>					SAR	Authorisation to Ship	3 i
<input checked="" type="checkbox"/>	+ Show	445608082 4	87764-22 3136463	No	i i						Certificates COC	Certificate of Conformance	i
<input type="checkbox"/>	+ Show	445608082 4	87764-22 3136463	No	i i	<input type="checkbox"/>					SAR	Authorisation to Ship	1 i

Uploading documents – Copy feature – End

3. You will now see the attachment copied to the selected lines.

<input checked="" type="checkbox"/>	+ Show	445608082 3	H110099	3136462		No						Certificates COC	Certificate of Conformance	
<input type="checkbox"/>	+ Show	445608082 3	H110099	3136462		No					<input type="checkbox"/>	SAR	Authorisation to Ship	3
<input checked="" type="checkbox"/>	+ Show	445608082 4	87764-22	3136463		No						Certificates COC	Certificate of Conformance	
<input type="checkbox"/>	+ Show	445608082 4	87764-22	3136463		No					<input type="checkbox"/>	SAR	Authorisation to Ship	1

4. To reduce processing times, please indicate the file is a duplicate copy within the Vendor comments field.

e.g. 'Document is same for lines 2,3 & 4'



Document is same for line

How to prepare document lines and add trace details

How to prepare lines

Select	Details	PO Number	PO Line Number	Part Number	DB Sequence	* Source Inspected ?	Vendor Doc Approval Status	ATS Waiver Request	ATS Waiv Appr Stat
<input type="checkbox"/>	+ Show	425421340	4	H301275-19	3125531	No			
<input type="checkbox"/>	+ Show	425421340	4	H301275-19	3125531	No			<input type="checkbox"/>

1. Update the Source Inspected fields to indicate if the item/s have been source inspected.
Hint: Source inspection is a requirement for inspection to be performed at the vendor site by third party / customer.

2. Leave the applied to ship quantity as full PO Line amount or reduce it if submitting request to ship partial PO line quantity.
Note: For partial shipment, after submitting a new ATS line will be generated displaying the remaining PO line quantity.

Document	Stand Vendor Doc Code	Stand Vendor Doc Description	Applied to Shipment Quantity	PO Ln Qty.	Vendor Comments	* Country of Origin	Document Approval Type
	Certificates COC	Certificate of Conformance		6	CoC for 4 off 1,2,3 & 4		Shipping
		to Ship	4	6	4 off ready to ship s/n 1- 4	United Kingdom	Shipping

3. Add comments where applicable.

4. Search and select Country of Origin.
Note: Selecting material origin is important as it may be subject to government restrictions to reach its final destination!

Adding *Mandatory trace details

Doc of Origin	Document Approval Type	Shipping Authorized By	Shipping Authorized On	Rejection Description	Approver Comments	Trace
	Shipping					
	Shipping					<input type="button" value="Trace"/>

Note: Make sure no other doc or SAR lines are checked!

1. Click the 'Trace' button to open 'SAR Trace Details' page.

2. Enter any Heat or Cast trace details.

Hint: The details can be edited before and after running trace engine generator.

SAR Trace Details

PO Number **445608234**
PO Line Number **1**

DB Sequence **3141143**
Applied to Shipment Quantity **9**

Heat Trace Number
Cast No

Serial/Batch No. Generation Criteria

TIP For Lot controlled items, select 'Batch' and for serial controlled items, select 'Serial'.
TIP Please use ";" as delimiter in case of Criterion Type

3. Click the 'Add' button

Hint: Repeat click the 'Add' button to add more lines as required.

Criterion Type	From Serial/Batch No.	To Serial/Batch No.	Delete
No search conducted.			

Adding trace details – Batch Range.

Adding trace details – Batch Range.

Serial/Batch No. Generation Criteria

✓ **TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial'

✓ **TIP** Please use ";" as delimiter in case of Criterion Type: Set

Add **Generate Serials/Batches**

Criterion Type	From Serial/ Batch No.	To Serial/ Batch No.	Delete
Batch - Range	98765432-01	98765432-02	
Batch - Range	99765432-01	99765432-03	

Batch - Range
Batch - Set
Serial - Range
Serial - Set

Heat Trace Number Cast Number Batch Qty

No results for

6. Click 'Generate Serials/Batches' button



5. Enter the trace detail.

Note: If the range is between 1 & 99, start should be -01, If from 1 to 999, start should be use -001 and so on..

Hint: Take care to ensure trace detail is accurate and only use dash (-) to separate text.



Note: DO NOT USE underscore to separate text (_) as this will cause bar codes creation to fail later in the process!

4. Chose the trace type:

Batch – Range = For Batch (Lot) number/s sequence 'From – To'

Batch – Set = For Batch (Lot) number/s not in sequence

Serial Range – For Serial number/s sequence 'From – To'

Serial Set – For Serial number/s not in sequence

Adding trace details – Batch Range End.

SAR Trace Details

PO Number **445608234**
PO Line Number **1**

DB Sequence **3141143**
Applied to Shipment Quantity **9** ⓘ

Serial/Batch No. Generation Criteria

- ✔ **TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial' as criterion types.
- ✔ **TIP** Please use ";" as delimiter in case of Criterion Type: Set.

Criterion Type	From Serial/Batch No.	To Serial/Batch No.	Delete
Batch - Range ▾	98765432-01	98765432-02	
Batch - Range ▾	99765432-01	99765432-03	

Serial/Batch Details

Serial/Batch No.	Heat Trace Number	Cast Number	Batch Qty
98765432-01	HT1234	CT1234	2
98765432-02	HT1234	CT1234	2
99765432-01	HT1234	CT1234	2
99765432-02	HT4321	CT1235	2
99765432-03	HT4321	CT1235	1

9. When ready Click Yes button.

No Yes

Warning

All changes will be saved (including the previous screen). Are you sure to continue?

8. Click Save, you will receive the above a warning msg..

Clear All Serials Save Cancel

7. Check the generated trace details are correct, add the batch quantities for each line, these need to match the 'Applied to Shipment Quantity'.

Hint: At this stage you can change the heat and cast should they be different for given traced batches.

Adding trace details – Batch Set.

Adding trace details – Batch Set.

Serial/Batch No. Generation Criteria

✓ **TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial'

✓ **TIP** Please use ";" as delimiter in case of Criterion Type: Set

Add **Generate Serials/Batches**

Criterion Type	From Serial/Batch No.	To Serial/Batch No.	Delete
Batch - Set	98765432-01		
Batch - Set	99765432-01		

Batch - Range
Batch - Set
Serial - Range
Serial - Set

Heat Trace Number	Cast Number	Batch Qty
No results		

6. Click 'Generate Serials/Batches' button



5. Enter the trace detail.

Note: The 'To' fields are not editable for Batch Set.

Hint: Take care to ensure trace detail is accurate and only use dash (-) to separate text.



Note: DO NOT USE underscore to separate text (_) as this will cause bar codes creation to fail later in the process!

4. Chose the trace type:

Batch – Range = For Batch (Lot) number/s sequence 'From – To'

Batch – Set = For Batch (Lot) number/s not in sequence

Serial Range – For Serial number/s sequence 'From – To'

Serial Set – For Serial number/s not in sequence

Adding trace details – Batch Set End.

SAR Trace Details

PO Number **445608234**
PO Line Number **1**

DB Sequence **3141143**
Applied to Shipment Quantity **9** ⓘ

Serial/Batch No. Generation Criteria

- ✓ **TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial' as criterion types.
- ✓ **TIP** Please use ";" as delimiter in case of Criterion Type: Set.

Criterion Type	From Serial/Batch No.	To Serial/Batch No.	Delete
Batch - Set	98765432-01		
Batch - Set	99765432-01		

Serial/Batch Details

Serial/Batch No.	Heat Trace Number	Cast Number	Batch Qty
98765432-01	HT1234	CT1234	5
99765432-01	HT1234	CT1234	4

9. When ready Click Yes button.

No Yes

Warning

All changes will be saved (including the previous screen). Are you sure to continue?

8. Click Save, you will receive the above a warning msg..

Clear All Serials

Save

Cancel

7. Check the generated trace details are correct, add the batch quantities for each line, these need to match the 'Applied to Shipment Quantity'.

Hint: At this stage you can change the heat and cast should they be different for given traced batches.

Adding trace details – Serial Range.

Adding trace details – Serial Range.

Serial/Batch No. Generation Criteria

✓ **TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial' as cri
✓ **TIP** Please use ";" as delimiter in case of Criterion Type: Set.

Add **Generate Serials/Batches**

Criterion Type	From Serial/Batch No.	To Serial/Batch No.	Delete
Serial - Range	445608234-1-01	445608234-1-04	
Serial - Range	445608234-1-14	445608234-1-18	

Batch - Range
Batch - Set
Serial - Range
Serial - Set

Heat Trace Number	Cast Number	Batch	Qty
No results found.			

6. Click 'Generate Serials/Batches' button



5. Enter the trace detail.

Note: If the range is between 1 & 99, start should be -01, If from 1 to 999, start should be use -001 and so on..

Hint: Take care to ensure trace detail is accurate and only use dash (-) to separate text.



Note: DO NOT USE underscore to separate text (_) as this will cause bar codes creation to fail later in the process!

4. Chose the trace type:

Batch – Range = For Batch (Lot) number/s sequence 'From – To'

Batch – Set = For Batch (Lot) number/s not in sequence

Serial Range – For Serial number/s sequence 'From – To'

Serial Set – For Serial number/s not in sequence

Adding trace details – Serial Range End.

SAR Trace Details

PO Number **445608234**
PO Line Number **1**

DB Sequence **3141143**
Applied to Shipment Quantity **9**

Serial/Batch No. Generation Criteria

- TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial' as criterion types.
- TIP** Please use ";" as delimiter in case of Criterion Type: Set.

Add **Generate Serials/Batches**

Criterion Type	From Serial/Batch No.	To Serial/Batch No.	Delete
Serial - Range ▾	445608234-1-01	445608234-1-04	
Serial - Range ▾	445608234-1-14	445608234-1-18	

Serial/Batch Details

Serial/Batch No.	Heat Trace Number	Cast Number	Batch Qty
445608234-1-01	HT1234	CT1234	
445608234-1-02	HT1234	CT1234	
445608234-1-03	HT1234	CT1234	
445608234-1-04	HT1234	CT1234	
445608234-1-14	HT1234	CT1234	
445608234-1-15	HT1234	CT1234	
445608234-1-16	HT1234	CT1234	
445608234-1-17	HT1234	CT1234	
445608234-1-18	HT1234	CT1234	

9. When ready Click Yes button.

No Yes

Warning

All changes will be saved (including the previous screen). Are you sure to continue?

8. Click Save, you will receive the above a warning msg..

Clear All Serials Save Cancel

7. Check the generated trace details are correct.

Hint: At this stage you can change the heat and cast should they be different for given serial traced items.

Adding trace details – Serial Set.

Adding trace details – Serial Set.

Serial/Batch No. Generation Criteria

✓ **TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial' as crit
✓ **TIP** Please use ";" as delimiter in case of Criterion Type: Set.

Add **Generate Serials/Batches**

Criterion Type	From Serial/ Batch No.	To Serial/ Batch No.	Delete
Serial - Set	445608106-2-001		

Details

Serial	Heat Trace Number	Cast Number	Batch Qty
No results found.			

6. Click 'Generate Serials/Batches' button



5. Enter the trace detail.

Note: Serial set is used to record serial trace for small PO line quantities e.g. 1 off.

Hint: Take care to ensure trace detail is accurate and only use dash (-) to separate text.



Note: DO NOT USE underscore to separate text (_) as this will cause bar codes creation to fail later in the process!

4. Chose the trace type:

Batch – Range = For Batch (Lot) number/s sequence 'From – To'

Batch – Set = For Batch (Lot) number/s not in sequence

Serial Range – For Serial number/s sequence 'From – To'

Serial Set – For Serial number/s not in sequence

Adding trace details – Serial Set End.

SAR Trace Details

PO Number **445608106**
PO Line Number **2**

DB Sequence **3141137**
Applied to Shipment Quantity **1**

Serial/ Batch No. Generation Criteria

✓ **TIP** For Lot controlled items, select 'Batch' and for serialized items, select 'Serial' as criterion types.
✓ **TIP** Please use ";" as delimiter in case of Criterion Type: Set.

Add **Generate Serials/Batches**

Criterion Type	From Serial/ Batch No.	To Serial/ Batch No.	Delete
Serial - Set	445608106-2-001		

Serial/ Batch Details

Serial/ Batch No.	Heat Trace Number	Cast Number	Batch Qty
445608106-2-001	HT4321		

7. Check the generated trace details are correct.

Hint: At this stage you can change the heat and cast should they be incorrect.

Warning

All changes will be saved (including the previous screen). Are you sure to continue?

8. Click Save, you will receive the above a warning msg..

9. When ready Click Yes button.

No

Yes

Clear All Serials

Save

Cancel

Adding trace details – End.



Request has been submitted for the addition of serials/batches and will be processed in next 5 minutes.

10. You will receive a message confirming trace details have been created and be returned to the landing page.

Note: You can change trace details at any time during processing but not after the lines have been approved!

Baker Hughes iSupplier Portal

Home Orders Shipments Finance RFQ Search Assessments Negotiations Quality GEOG Quality Supplier Scorecard

Navigator Favorites Home Logout Preferences

Quality Results Page

Search Add Category Copy Save Submit for Approval

* PO Number: 425421340
 PO Line Number:
 Vendor Doc Approval Status:
 Document Approval Type:
 Std Vendor Doc Code:

Quality Results

TIP Please ensure to select all the considered lines before saving.

Select All | Select None

Select	Details	PO Number	PO Line Number	Part Number	DB Sequence	* Source Inspected ?	Vendor Doc Approval Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Document Submission Date	Stand Vendor Doc Code	Stand Vendor Doc Description	Applied to Shipment Quantity	PO Ln Qty.	Vendor Comments	* Country of Origin	Document Approval Type	Shipping Authorized By	Shipping Authorized On	Rejection Description	Approver Comments	Trace
<input type="checkbox"/>	Show	425421340	4	H301275-19	3125531	No	Submitted				+	24-Nov-20	Certificates COC	Certificate of Conformance	1	6	CoC for 4 off 1,2,3 & 4		Shipping					
<input type="checkbox"/>	Show	425421340	4	H301275-19	3125531	No	Submitted	<input type="checkbox"/>			+	24-Nov-20	SAR	Authorisation to Ship	4	6	4 off ready to ship	United Kingdom	Shipping					Trace
<input type="checkbox"/>	Show	425421340	4	H301275-19	3125532	No		<input type="checkbox"/>			+		SAR	Authorisation to Ship	2	6			Shipping					Trace

How to Submit document lines

How to Submit document lines

Quality Results				
✔ TIP Please ensure to select all the consid				
Select All Select None				
Select	Details	PO Number	PO Line Number	Part Number
<input checked="" type="checkbox"/>	+ Show	425421340	4	H3012719
<input checked="" type="checkbox"/>	+ Show	425421340	4	H3012719

1. Check the line/s you are ready to submit.

2. Click 'Submit for Approval' button.

Search

Add Category

Copy

Save

Submit for Approval

Hint: Use the save button to save work in process.

Information

There are some documents related to this PO number currently getting processed in system. Please search again after few minutes to see the latest information.

How to Submit document lines - Cont.

3. You will see the line status change to 'Submitted' and the submission date recorded.

Vendor Doc Approval Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Document Submission Date	Stand Vendor Doc Code
Submitted					24-Nov-20	Certificates COC
Submitted	<input type="checkbox"/>				24-Nov-20	SAR

How to Submit document lines - End.

Hint: Should you have multiple lines ready to submit, you can prepare and submit them for approval at the same time, check all lines and click 'Submit for Approval'

Search

Add Category

Copy

Save

Submit for Approval

<input checked="" type="checkbox"/>	+ Show	445608082	3	H110099	3136462	<input type="text" value="No"/>								Certificates COC	Certif Conf
<input checked="" type="checkbox"/>	+ Show	445608082	3	H110099	3136462	<input type="text" value="No"/>			<input type="checkbox"/>					SAR	Auth to Sh
<input checked="" type="checkbox"/>	+ Show	445608082	4	87764-22	3136463	<input type="text" value="No"/>			<input type="checkbox"/>					Certificates COC	Certifica Conform
<input checked="" type="checkbox"/>	+ Show	445608082	4	87764-22	3136463	<input type="text" value="No"/>			<input type="checkbox"/>					SAR	Authori to Ship

<input checked="" type="checkbox"/>	+ Show	445608082	3	H110099	3136462	<input type="text" value="Submitted"/>			<input type="checkbox"/>					24-Nov-20	Certificates COC	Certif Conf
<input checked="" type="checkbox"/>	+ Show	445608082	3	H110099	3136462	<input type="text" value="Submitted"/>			<input type="checkbox"/>					24-Nov-20	SAR	Auth to Sh
<input checked="" type="checkbox"/>	+ Show	445608082	4	87764-22	3136463	<input type="text" value="Submitted"/>			<input type="checkbox"/>					24-Nov-20	Certificates COC	Certifica Conform
<input checked="" type="checkbox"/>	+ Show	445608082	4	87764-22	3136463	<input type="text" value="Submitted"/>			<input type="checkbox"/>					24-Nov-20	SAR	Authori to Ship

What to do if a document is rejected

What to do if a document is rejected

1. You will see the line status as 'Rejected'

2. Check the rejection description and approver comments advising why the line has been rejected?

Sequence	* Source Inspected ?	Vendor Doc Approval Status	Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Doc Sub Date
25531	No	Rejected					24-Nov-
	No	Submitted	<input type="checkbox"/>				24-Nov-20

Document Approval Type	Shipping Authorized By	Shipping Authorized On	Rejection Description	Approver Comments
Shipping			0005 - 10 DOCUMENTATION-10AE MISSED SIGNOFF	CoC is missing signature.

Hint: Email notifications are automatically sent when lines are rejected.



Hint: Due to Approver Comments field having limited text characters, document controllers will add longer rejection text within the attachments section of the line!



View Attachment

Attachment Summary Information

Title **Rejection notes**
 Description **Rejection notes**
 Category **Miscellaneous**

Attachment Text

1. ITP not aligned with Customer Quality plan section 22.
2. BOM item #123456 FAT section #123 requires customer signature box adding in-line with ITP.
3. Index section 10 is missing Weld approval.

What to do if a document is rejected - Cont.

Sequence	* Source Inspected ?	Vendor Doc Approval Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Doc Sub Date
25531	No	Rejected					24-Nov-20
	No	Submitted	<input type="checkbox"/>				24-Nov-20

3. To update the attached file, Click on the attached file Icon.

Attachments

Search

Note that the search is case insensitive

Title

[+ Show More Search Options](#)

MarkView	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
	Certificate of Conformity_425421340-4	File	Certificate of Conformity 425421340-4 6 off	Miscellaneous	DEPRO1	24-Nov-2020	One-Time			

4. In the attachments window Click on the 'Add Attachment' button.
Hint: DO NOT delete the originally submitted document as the new one loaded will be automatically treated as the latest revision.

[Return to Quality Results Page](#)

What to do if a document is rejected – Cont.

Attachment Summary Information

Title Certificate of Conformity 4 off
Description Updated Certificate of Conformity 4 off signature added.
Category **Miscellaneous**


5. Add Title and Description

Define Attachment

Type File URL Text
Choose File Certificate o...21340-4.pdf

6. Click 'Choose File' button and select update file

7. Click 'Apply' button

 **Confirmation**
Certificate of Conformity 4 off attachment has been added successfully.

Cancel

Add Another

Apply

What to do if a document is rejected - Cont.

Attachments

Search

Note that the search is case insensitive

Title

[+ Show More Search Options](#)

Add Attachment

MarkView	Title	Type	Description	Category	Created By	Last Updated	Usage	Update	Delete	Publish to Catalog
	CoC-425421338-1-1-RevA	File	Certificate of Conformity 425421340-4 6 off	Miscellaneous	DEPRO1	24-Nov-2020	One-Time			
	CoC-425421338-1-1-RevB	File	Updated Certificate of Conformity 4 off signature added.	Miscellaneous	DEPRO1	25-Nov-2020	One-Time			

8. Re-query the attachments window to check new document line attached.

[Return to Quality Results Page](#)

9. Select both the rejected document line and the SAR line.

Select	Details	PO Number	PO Line Number	Part Number	DB Sequence	* Source Inspected ?	Vendor Doc Approval Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Atta
<input checked="" type="checkbox"/>	+ Show	425421340	4	H301275-19	3125531	No	Rejected				
<input checked="" type="checkbox"/>	+ Show	425421340	4	H301275-19	3125531	No	Submitted	<input type="checkbox"/>			

What to do if a document is rejected – End.

Stand Vendor Doc Code	Stand Vendor Doc Description	Applied to Shipment Quantity	PO Ln Qty.	Vendor Comments	* Country of Origin	Doc App. Type
Certificates	Certificate of Conformance		6	Updated Signed CoC attach 		Shipping
	Authorisation to Ship	4 	6	4 off ready to ship 	United Kingdom	Shipping

10. Update Vendor Comments.

11. Click 'Save' This will clear the line status.
12. Finally, Click 'Submit for approval'

Information
Selected records are submitted for approval successfully.

Hint: You will see messages in the top left hand side of the main window.

13. You will now see rejected document line/s as 'Submitted'

Force Inspected ?	Vendor Doc Approval Status	ATS Waiver Request Status	Waiver Approval Status
	Submitted		
	Submitted		

What happens when authorisation to ship is approved

What happens when ATS is approved

1. Line status will show as 'Approved'

Vendor Doc Approval Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Document Submission Date	Stand Vendor Doc Code	Stand Vendor Description
Approved					25-Nov-20	Certificates COC	Certificates Conformance
Approved					24-Nov-20	SAR	Authorisation to Ship



Hint: Check the approver comments for any extra information.

Note: Any rejected document reason codes will remain for performance analysis / reporting.

2. ATS line will contain approved by and date approved.

Document Approval Type	Shipping Authorized By	Shipping Authorized On	Rejection Description	Approver Comments
Shipping			0005 - 10 DOCUMENTATION-10AE MISSED SIGNOFF	Document Inspection Pass
Shipping	A.N. Approver	25-NOV-20		Approved to ship 4 off

What happens when ATS is approved- Cont.

Shipping Authorization	
Supplier:	A Supplier
Purchase Order:	123456789 
PO Line:	4 
Location:	A Location (A00)
Part:	A Part Number
Expiration Date:	
DB Seq	A Part Number
PO Quantity:	100
Description:	A detailed description of the part.
Partial Qty	20
Approver Comment:	Approved to ship
Shipment Authorized By:	A.N. Approver 08-DEC-20

3. Shipping Authorisation Report (SAR) is automatically sent via email.

Page 1 contains the PO Header and document approver details along with any partial shipment qty.



Note: A copy of the approved SAR must be sent with the goods being shipped.

What happens when ATS is approved– End.

4. The following pages contain trace details entered when preparing the lines to submit.

Hint: Check trace is correct in-line with goods being shipped as if incorrect this could delay the receiving process!



Row	Serial Number	Serial Number Barcode	Heat/Lot Number Barcode	Cast Number Barcode
1 OF 4	425421340-4-1			
2 OF 4	425421340-4-2			
3 OF 4	425421340-4-3			
4 OF 4	425421340-4-4			

How to request authorisation to ship waiver

ATS waiver request

1. Follow the document category selection process but leave the document line/s blank at this stage unless required for example: If a document is required to be submitted with the ATS waiver request e.g. Certificate of Conformance (CoC) ahead of full document package, the CoC line can be completed and submitted with the ATS waiver allowing for the processing of the remaining document lines at a later date.
2. Populate the SAR ATS line as normal including any trace details.
3. Contact PO/Line Buyer to request 'ATS Waiver Request' be initiated.
4. The Buyer will check 'ATS Waiver Request' box and submit SAR line requesting waiver to ship goods.

Vendor Doc Approval Status	ATS Waiver Request	Attachments	Document Submission Date	Stand Vendor Doc Code	Stand Vendor Doc Description	Applied to Quantity	Vendor Comments	* Count
	<input type="checkbox"/>							
	<input checked="" type="checkbox"/>			SAR	Authorisation to Ship	18	Waiver to ship, docs to foll	United Kin

ATS waiver request – End

- 6. The SAR line status will now show as 'Submitted'.
- 7. The ATS Approver team will receive notification containing details of the request and will action the request appropriately.



Vendor Application Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Document Submission Date	Stand Vendor Doc Code	Stand Vendor Doc Description	Applied to Shipment Quantity	PO Ln Qty.	Vendor Comments	* Count
							<input type="text"/>		18	<input type="text"/>	
	Submitted	<input checked="" type="checkbox"/>			04-Jan-21	SAR	Authorisation to Ship	18	18	Waiver to ship, docs to follow	United Kingdom

Authorisation to ship waiver (Rejected)

ATS waiver request (Rejected)

1. The SAR line status will remain as 'Submitted'.
2. The ATS Waiver Approval Status will be 'Rejected'

Ver App Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Document Submission Date	Stand Vendo Doc Code
Submitted	<input checked="" type="checkbox"/>	Rejected	04-JAN-21		04-JAN-21	FAT Pressure Test SAR

3. ATS Waiver Rejection email is automatically sent.





4. ATS Approver may also add rejection comments advising why the request was rejected.

nt Shipping l	Shipping Authorized By	Shipping Authorized On	Rejection Description	Approver Comments	Trac
				Waiver rejected as items not urgent	Trac

Authorisation to ship waiver (Approved)

ATS waiver request (Approved)

1. The SAR line status will remain as 'Submitted'.
2. The ATS Waiver Approval Status will change to 'Approved'

Vendor Approval Status	ATS Waiver Request	ATS Waiver Approval Status	ATS Waiver Approval Date	Attachments	Document Submission Date	Stand Vendor Doc Code	Stand Vendor Description
Submitted	<input checked="" type="checkbox"/>	Approved	04-JAN-21		04-JAN-21	FAT Pressure Test	Performance Tests - Pressure T
						SAR	Authorisati to Ship

3. ATS Waiver Report is automatically sent via email.

As with the SAR Report, page 1 contains the PO Header and document approval details along with partial shipment qty.



Note: A copy of the approved Waiver Report must be sent with the goods being shipped.

Baker Hughes 