

The supplier deviation request (SDR) provides a central location where users can review, document, and collaborate on a deviation found in the material the used to fulfill the purchase order. The SDR is almost always initiated by the supplier who determines which buyer and sourcing quality engineer (SQE) should be assigned to and notified of the SDR.

You may route the SDR to other users within your own organization, associating additional user names with the SDR and including them on the status change email notifications.

When an open SDR exists, the supplier is prevented from creating a shipment or invoicing for the associated purchase order. The ultimate goal is to move the SDR from the INITIATED to CLOSED status, freeing the supplier to ship and invoice for the PO.

Understanding the SDR screen

The SDR screen is made up of multiple areas that are used for specific purposes, as described below.

Deviation Toolbar – this area displays the status of the supplier deviation request (SDR), contains buttons used to Save, Email, Route, and Export the SDR. This area also allows users to switch between the quality roles assigned to their user profiles. A Lock for Edit icon appears when you view an existing SDR.

Header Information – this area contains information that applies to the entire supplier deviation request (SDR), such as the responsible buyer and sourcing quality engineer names, the SDR number and creation date, and the business unit. Export control settings are also made in this area.

Other Information – this area contains additional information about the production of the item, such as the project name, shop order number, associated sub-supplier, and more. These fields are not required, but may be helpful in determining a resolution of the problem.

PO Information – this area contains a list of purchase orders that are affected by the deviation. For example, when an SDR is created from the Search Orders screen, the selected POs will be displayed in this area. The user can also manually add or remove POs from this area.

Supplier Information – this area contains the contact and location information for the supplier to whom the deviation request (SDR) belongs. The values available in the drop-down lists are based on the suppliers and supplier locations assigned to your user profile.

Part Information – this area contains information about the item for which the supplier deviation request (SDR) was created. The item number, item description, and item revision fields are added for you when the SDR is created from a purchase order.

Attachments – this area allows users to add files to the SDR. Any user with a quality role associate to their user profile can view or delete attachments that have been added to the SDR. In order to add or remove attachments, the SDR must be locked.

Deviation Detail – this area is where the problem is described. Each SDR must have at least one deviation detail, which describes the flaws in the product, proposed material substitutions, and captures the disposition from engineers, sourcing quality engineers/leaders (SQEs/SQLs), or suppliers. After the creation of the SDR, the majority of the work will be performed in this area.



Creating an SDR

There are two ways to create an SDR: [1] from an existing purchase order or [2] as a new document that is later associated to a PO. In either case, the following required fields must be entered in order to save the SDR: Supplier, Supplier Number, Contact Name, Business Unit, Buyer Name, Sourcing Quality Engineer, and Item #.

Creating an SDR from a Purchase Order

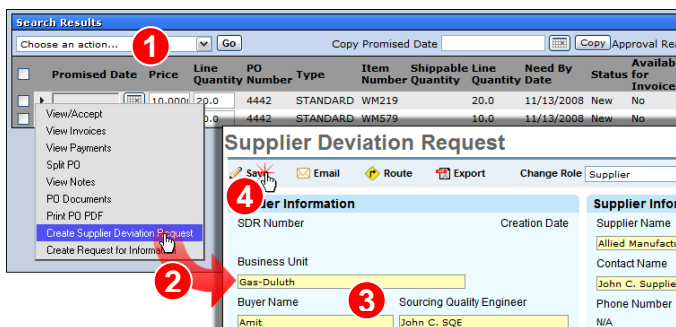
When an SDR is created from a purchase order line, information pertaining to the item, such as **Item #** and **Item Description**, is transferred to the SDR. Additionally, the purchase order(s) you selected are added to the PO Information area. To create a new SDR from a purchase order line:

1. Click **Purchase Orders**, then **Search Orders** from then X.PC menu and locate the purchase order line(s) that you would like to associate to the SDR.
 2. Hover over the arrow to the left of the purchase order line and choose **Create Supplier Deviation Request** from the context menu.
- or

Check the box(es) next to each line you would like to add to the SDR, select **Create Supplier Deviation Request** from the **Choose an Action...** drop-down list, and click **Go**.

Note: In order to create an SDR for multiple purchase order lines, the following conditions must be met: the purchase order lines [1] have been created for the same supplier/supplier location and [2] the operating unit, buyer, and item are the same.

3. Complete the required fields.
4. Click **Save**.



Creating an SDR from "Scratch"

When an SDR is created from scratch, there are more details that need to be entered before it can be saved. To create a new SDR from scratch:

1. Click **Engineering Quality**, then **Create Deviation Request** from the X.PC menu.
2. At a minimum, complete the required fields.

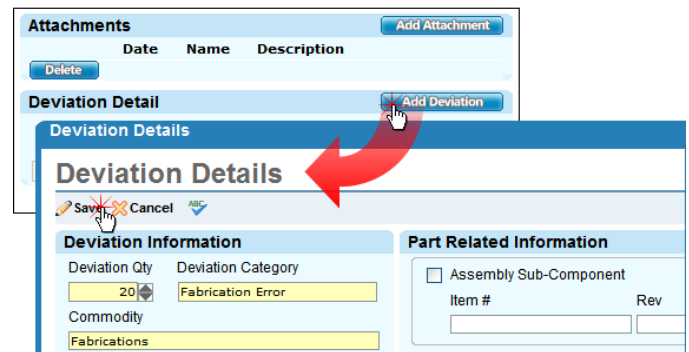
Note: Other required fields, such as **Item Description** and **PO Number**, will eventually need to be completed before the SDR can be placed into the INITIATED status.

3. Click **Save**.

Adding Deviation Details

A deviation detail describes one problem with the material. If multiple problems exist, you should create multiple deviation details. When a deviation detail is added to the SDR, it is given the status NEW. There are a few required fields and many more fields that are optional. It is important to provide detailed information about the deviation at the start of the process; otherwise, the SDR may be sent back to you with a request for more information.

1. Locate, view, and lock the SDR to which you would like to add the deviation detail.
2. Scroll to the bottom of the screen and click **Add Deviation**.



3. At a minimum, complete the **Deviation Qty**, **Deviation Category**, and **Commodity** fields in the Deviation Information area.

Note: The deviation quantity entered for this detail cannot be greater than the Defective Quantity field entered in the PO Information area.

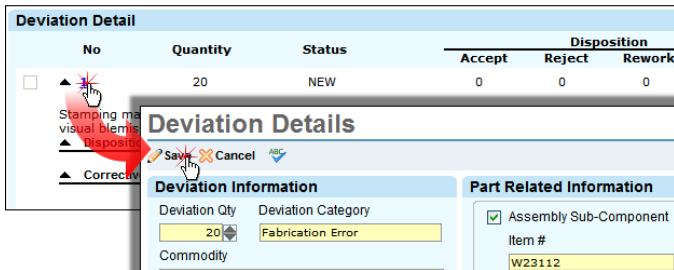
4. Provide a detailed account of the problem in the **Deviation Description** field.
5. If necessary, enter material/part substitution details, subcomponent information, serial numbers, and additional supplier responsibility.
6. Click **Save**.



Editing an Existing Deviation Detail

When you access an SDR, deviation details are displayed at the bottom of the screen. To work with an existing deviation detail:

1. Locate, view, and lock the SDR that contains deviation detail you need to edit.
2. Scroll to the bottom of the screen and locate the Deviation Details area. Click the **No** link.
3. After making changes, click **Save** at the top of the Deviation Details form.



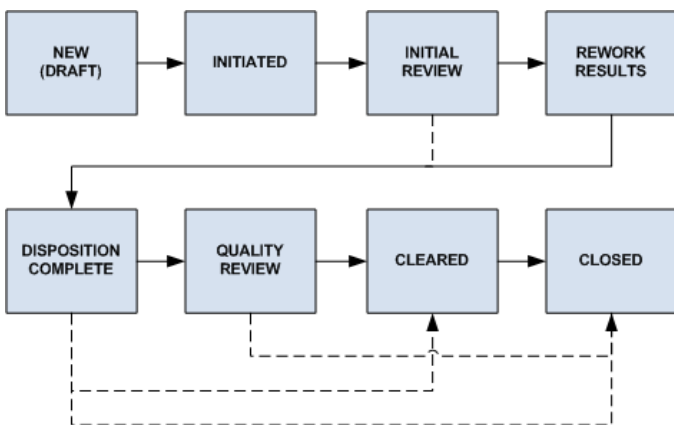
In order to change the status of a deviation detail, you must ensure that certain criteria are met:

Status	Description
NEW (DRAFT)	The SDR/deviation detail has just been created but not submitted to the buyer organization for review.
INITIATED	Email notifications are sent and the SDR/deviation detail is turned over to users from the buyer organization for their review and input. Prerequisites: <ul style="list-style-type: none"> • The Review Export Control setting must be selected. • At least one PO has been added to the SDR. • At least one deviation detail has been added to the SDR.
INITIAL REVIEW	The SDR has been reviewed by someone from the buyer organization and routed to an engineer or Sourcing Quality Leader (SQL). Prerequisites: <ul style="list-style-type: none"> • All previous requirements. • The Export Controlled Data Reviewed box must be checked.
REWORK RESULTS	The supplier has provided the additional level of detail or requested test results. Prerequisites: <ul style="list-style-type: none"> • All previous requirements. • The Rework Results Required and Additional Info Required boxes must be unchecked.
DISPOSITION COMPLETE	Users from the buyer organization are finished adding their comments and have submitted the SDR/deviation detail for a final review. Prerequisites: <ul style="list-style-type: none"> • All previous requirements. • The Disposition Information has been completed.
QUALITY REVIEW	Users from the buyer organization have reviewed the additional information, rework results, and disposition details. Prerequisites: <ul style="list-style-type: none"> • All previous requirements.

Understanding Statuses and Requirements

As the SDR progresses through the review process, it will be placed into a variety of statuses, with the eventual goal of becoming CLEARED and finally CLOSED. The graphic below describes the variety of paths that can be taken during an SDR's lifetime.

Note: The status of an SDR can be changed to VOID at any point in the review process, unless the SDR has been CLOSED. No further changes can be made to a CLOSED SDR.





Status	Description
CLEARED	<p>A resolution on the SDR/deviation detail has been reached and the supplier is now free to fulfill the purchase order. Prerequisites:</p> <ul style="list-style-type: none"> All previous requirements. A corrective action setting must be made.
CLOSED	<p>The SDR/deviation detail process is finished. As with the CLEARED status, the supplier is free to fulfill the purchase order. No changes or additional comments can be left. Prerequisites:</p> <ul style="list-style-type: none"> All previous requirements. The corrective action, if required, has been closed.
VOID	The SDR/deviation detail is no longer required.

Note: In the graphic above, the user is a supplier. Supplier can only initiate or void an SDR.

Understanding SQE, SQL, and Engineer Tasks

Users from the buyer organization (i.e., Engineer, SQE, or SQL) may need to perform the actions described in this section before advancing the status of the deviation detail.

Requiring Additional Information from the Supplier

The SQE, SQL, or engineer can require supplier actions to enter additional information or rework results. When supplier action is required, an email notification is sent to the user listed in the Contact Name field of the Supplier Information area. To require supplier action:

1. Locate the **Disposition Information** area of the Deviation Detail form.
2. Check one or both of the following boxes:
 - **Additional Info Required** – to request that the supplier provide more details surrounding the incident or deviation.
 - **Rework Results Required** – to request that the supplier attempt to fix the deviation and provide details about the outcome.

Note: Both of these boxes must be unchecked in order to advance the deviation detail to (or beyond) the **DISPOSITION COMPLETE** status.

3. Provide adequate instructions so the supplier knows what action is required. Use the **Deviation Description** or **Additional Comments** fields to communicate direction to the suppliers.
4. Click **Save**. Email notifications are sent to the supplier.

Changing the Status of an SDR/Deviation Detail

The status is associated with the deviation detail. The SDR displays the “lowest” status of all its deviation details. For example, if the SDR has two deviation details, one that is in **QUALITY REVIEW** and the other that is **INITIATED**, the SDR status will be **INITIATED**.

In the instructions below, a deviation detail will be initiated by a supplier. When the deviation is initiated, the buyer and SQE associated with this deviation request will be notified via email. To change the status of a deviation detail:

1. Locate, view, and lock the SDR that contains the deviation detail you would like to advance in status and scroll to the bottom of the screen and locate the **Deviation Details** area (page 281).
2. Check the box(es) next to the deviation detail(s) for which you would like to change the status.
3. Choose the status from the drop-down list below and click **Go**. The screen will be refreshed, statuses changed, and the SDR unlocked.



Entering Disposition Information

Before an SDR/deviation detail can enter the `DISPOSITION COMPLETE` status, a user with the SQE, SQL, or Engineer role must provide a final assessment of the situation and instructions for the supplier. To enter disposition information:

1. Open the Deviation Detail form and enter an assessment into the **Disposition Description** field.
2. Enter the number of items to **Accept, Reject, Rework, or Repair**.

Note: Only the engineer role has access to all of the above fields. The SQE role only has access to the Reject and Rework fields and the SQL role cannot edit any of these fields.

3. Click **Save**.

Requiring a Corrective Action

Before the deviation detail can be put into the status `CLEARED` or `CLOSED`, you must decide if a corrective action (CA) is required. To determine the CA setting:

1. Open the Deviation Detail form and choose the **Corrective Action Required** radio button that meets your needs:
 - **Yes** – when a CA is required, the deviation detail cannot be closed until the associated CA has been closed.

If you choose **Yes** and then change the status or save the deviation detail, a corrective action is automatically created.

- **No** – when a CA is not required, you must select a value from the **No CA Reason Code** list and enter a description into the **No CA Reason** field.

Note: Selecting **Previous Corrective Action SDR** from the **No CA Reason Code** activates the **Existing CA Reference** field where you can enter an existing corrective action number.

2. Click **Save**.