

TERL Document Development History			
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Sivam		01-09-06	Draft
Sivam		02-16-06	Draft
Bentz		02-22-06	Draft
Sivam		03-29-06	Draft
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Lisansky	Implement Changes	2006-07-06	Draft

Approved by:	Name	Signature	Date	Action Required		
				R	C	A
Research Advisor	Dr. Simpson					
TERL Quality Engineer	Steve Bentz					
TERL Quality Manager	Jeff Morgan					

Nomenclature

- R - Review
- C - Comment
- A - Approve

Pre-Evaluation Process

All submittals from the vendors are addressed to the Program Manager who shall forward the received documents to the evaluator. The submittal packages may consist of several items which could be presented in various formats.

Example:

Items – QA manual, response to the QA survey, manufacturing video, Procedure folder etc.

Formats – Paper, electronic, VHS, DVD, VCD etc.

Upon receiving the submittal package, it is necessary to understand how to manage these items in their respective formats in respect to document control information/document labeling, storage and retrieval.

The following procedures shall be studied in reference with the Pre-Evaluation Flow Chart (FC-PE), located at the end of this document:

1 Receive Submittal

1. Manually stamp or write down the date of receipt from Program Manager on front page of each document of the submittal package.
2. Verify if this submittal is “new” (1st time submittal) or “follow up” material.
3. If ‘new’ go to **3** otherwise go to **2**

2 Update QA Status Database & Vendor Folder

1. Update QA status database
 - a. Login – Website: <http://potentia.eng.fsu.edu/qrtdb/login.php>
 - b. Click on **Main Page**
 - i. Locate and click on vendor’s name to go to their information page (Hint: vendor should be located in “Pre-evaluation Failed” status group)
 1. In the **Event Log** section click on **Generic Events**
 - a. Select the appropriate Event Type (submittal) using the pull down menu
 - b. Type in suitable comments in **Comment** space – i.e. submittal type, format, receipt date if earlier, etc.
 - c. Click on **Done**

Notes

-It is advisable to perform this activity on the same date the package is received from the Program Manager.

*-Upon clicking the **Done** button, user will be taken back to the vendor’s page*

-Note that the last row of Event Log section shall have the latest updates stored

2. In the **Company information** section, update the rows of missing information if the information is provided in the latest submittal.
Click the **Update Information** button when done.
- ii. If the user decides to perform the pre-evaluation for this vendor, click on **Reserve Task**, otherwise click on **Return to main** for other activities or click on **Logout** to logout.

Note

*-In case of incorrect information or content, use the **Delete** column in the **Event Log** section to negate the error, and redo the update process with the correct information.*

2. Update Folder in the TERL server
 - a. Location : \\Bahcomm10\terl files\quality\Companies' Evaluations
 - b. Select the respective vendor
 - c. Create a new folder and name it “Submittal – Add date”
 - d. Upload all electronic documents into the folder created in (c)
 - e. Done

Note

-As far as submittal material is concerned, the vendor folder is used to store all electronic documents received from the vendor throughout the entire evaluation process.

3 New Vendor Setup

This is the initial step when the submittal package is from a “new” vendor.

1. New Vendor Setup in Database
 - a. Login – Website: <http://potentia.eng.fsu.edu/qrtodb/login.php>
 - b. Click on **Main Page**
 - i. Scroll down the page and Click on the **Add Manufacturer** button for a new entry
 1. On this page enter as much information that is available from the submittal and then click on the **Insert Information** button
 2. Click on vendor’s name (Hint: vendor located in blank status group, at the bottom of the page)
 3. In the **Event Log** section click on **Generic Events**
 - a. Select the appropriate Event type (submittal) using the pull down menu
 - b. Type in suitable comments in **Comment** space – i.e. submittal type, format, receipt date if earlier, etc.
 - c. Click on **Done**

Notes

-It is advisable to enter the information in the database on the same day the submittal package is received from the Program Manager.

*-Upon clicking the **Insert Information** button, the user will be taken back to the main page.*

-The main page vendor entry will not have any status until a generic event is entered for that vendor.

-Note that the last row of Event Log section shall have the latest updates stored

- ii. If the user decides to perform pre-evaluation for this vendor, click on **Reserve Task**, otherwise, click on **Return to main** for other activities or click on **Logout** to logout.

Note

-In case of incorrect information or content, use the **Delete** column in the **Event Log** section to negate the error, and redo the update process with the correct information.

2. Create Folder in the TERL server

- a. Go to location : \\Bahcomm10\terl files\quality\Companies' Evaluations
- b. Create a new folder and name it according to the vendor's name
- c. In the vendor's folder create a new folder and name it "Submittal – Add date"
- d. Upload all electronic documents into the folder created in (c)
- e. Done

Note

-As far as submittal material is concerned, the vendor folder is used to store all electronic documents received from the vendor throughout the entire evaluation process.



Start Pre-Evaluation

The pre-evaluation questionnaire is an electronic document linked to the QA status database. Access is accomplished by observing the following steps.

1. Click on the vendor that needs to be pre-evaluated.
 - a. In the **event log** section, click on the **Reserve Task** button. The **Pre-evaluation** button now appears below the Generic Events button. At this time note that the **Reserve Task** button has changed into **Release Task** button
 - b. Click the **Pre-evaluation** button, which loads the Pre-evaluation Page.
 - i. Perform the pre-evaluation by clicking on the **Yes** or **No** buttons as applicable, located at the right end of each question.
 - ii. Click the **Finish** button when all the questions have been answered.
 - iii. The pre-evaluation is automatically scored based on the weighted answers selected.

Note

-Upon clicking on the **Finish** button, a confirmation page will be loaded.

-In this page information pertaining to the pre-evaluation event and document location are provided.

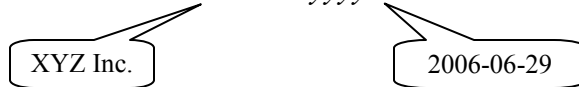
- c. Upon completion of the pre-evaluation, return to the QA status database – company page and click on the **Release Task** button.
- d. Click the **Return to Main** link to go to the QRT Database Main Page or the **Logout** link to end the session.

5 Generate Report

Upon completion of the pre-evaluation activity, a passing grade (70 points or higher) will advance the vendor to the **evaluation pending** queue, whereas a failing grade moves the vendor to the **pre-evaluation failed** queue. Either result requires a report to the Program Manager, who forwards word to the vendor of their evaluation status.

An electronic document, used to generate a report of pre-evaluation activity, is system-generated upon completion of the pre-evaluation questionnaire. This report is stored in the database and can be extracted from the **event log** section found in the QA status database – company page. Evaluators must save this document in the corresponding vendor’s folder by making changes to the filename by selecting ‘**pass**’ or ‘**fail**’ and changing ‘**vendor name**’ and ‘**date of Pre-Evaluation**’:

VQA-PreEval-Pass~Fail-Vendor Name-yyyy-mm-dd



The user then sends an email to the Program Manager giving the vendor’s pre-evaluation results, along with the associated .pdf report.

Pre-Evaluation process is complete.

6 Referenced Documents

VQA-PreEval-Pass~Fail-Vendor Name-yyyy-mm-dd

QA Pre-Evaluation FC-PE 1/1

