Quality Notes
BAER Reviewer Role Guide

March 2018

Contents

Introduction

This role-based guide covers the primary actions that are performed specifically by users with the BAER Reviewer role.   For a more comprehensive guide, please reference the Quality Notes User Guide.

About the BAER Reviewer Role

Users with the BAER Reviewer role ensure compliance with import/export government regulations by the review and application of Jurisdiction and Classification (J/C) license to QNs that contain technical data. Review and application of J/C licenses can be completed in Quality Notes or in a user's local system via a B2B connection. It is the responsibility of users with the BAER Reviewer role to ensure they are authorized to apply licenses. Quality Notes does not verify authorization for the role.

Search

The Quality Notes solution has a variety of searches available. Purchase Order Search and Draft Search are types of searches specifically available to users with the QNO role. Additional search types can be located in the Quality Notes User Guide.

Using Search to Locate Quality Notifications

You can locate QNs using the search options available on the Navigation Tree. Search is best used when you are looking for a specific notification. The Search option allows you to search using **QN Search** and **QN Summary**. Depending on your role, Navigation Tree results may appear differently. If you have multiple user roles, you must be logged in with the correct role for the information you are searching for is associated with.

1. From the **Navigation Tree**, go to **Quality Notification** then click **QN Search** or **QN Summary**.

2. If selecting **QN Search,** enter or select search criteria. Click **Search**.

Note:

- *Search fields without the **auto-complete** feature are case sensitive.*
- *Asterisks (*) can be used a wildcards for unknown characters.*
- *Use commas to separate multiple items.*
- *The magnifying glass can be used to perform advanced searches.*

3. Search results display. Click the **QN** to view.

Note: **View History** allows you to view the audit history of a QN.

4. If selecting **QN Summary,** the QN Summary page provides access to all transactions within each notification workflow state. **Results may vary depending on what role you are using.**

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5. Access the list of notifications in a specific state by clicking on the number in the **Total** column. To narrow results, enter or select search criteria and click **Search**. Results display by state. Information that displays varies by role.

QN History Search

The QN History Search feature provides an audit trail of QNs.

To search:

1. From the **Navigation Tree**, go to **Quality Notification** then **History.**

2. Enter or select search criteria. Click **Search**.

Note:
- *Search fields without the **auto-complete** feature are case sensitive.*
- *Asterisks (*) can be used a wildcards for unknown characters.*
- *Use commas to separate multiple items. The system allows users to search for multiple QNs at one time.*

- *The magnifying glass can be used to perform advanced searches.*

3. Audit detail information displays. Click the **QN** to view audit history. If you have multiple QNs (as shown below), click the QN number to view audit history for that specific QN.

Purchase Order (PO) Search

PO Search allows users to locate POs.

To search:
1. From the **Navigation Tree**, go to **Purchase Order** then **Search.**
2. Enter or select search criteria. Click **Search**.

Note:
- *Search fields without the **auto-complete** feature are case sensitive.*
- *Asterisks (*) can be used a wildcards for unknown characters.*
- *Use commas to separate multiple items. The system allows users to search for multiple POs at one time.*
- *The magnifying glass can be used to perform advanced searches.*

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3. Search results display. The 1 and the 2 after the PO indicates the **PO Item Number**. QNs can be created against a specific PO Item number for a given PO. Click the **PO** to view.
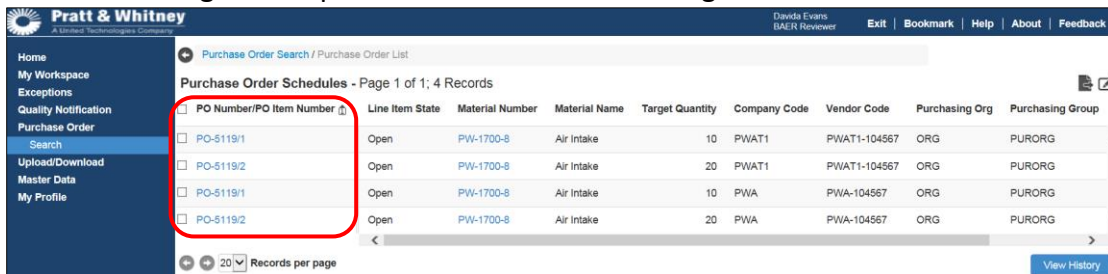
Note: **View History** allows you to view the audit history of a PO.

Search Field Definitions

QN Search and History Search Fields

Hub QN Number	QN Number (e.g. HQN-100)
POI QN Number	Internal number used for POI
Vendor Material/Part No.	Vendor's Material Number or Part Number
Owner	Owner of the QN (e.g. QNO, DRP, etc.)
Line Item State	State of the QN defect line
Defect Line	QN Line Number that uniquely identifies each line in the QN
Material Number	Unique number that identifies the material/part
QN Creation Date	Date or date range of QN creation
Vendor Code	Code assigned to a vendor during the creation of a PO

PO Search Fields

PO Number	The number assigned to a Purchase Order
Material Number	Unique number that identifies the material
PO Item Number	Item number listed within a PO
Order State	State of the Purchase Order (Opened or Closed)

Engine Center QNs

Engine Center QNs from PWA engine centers (internal engine center QN) or non-PWA engine centers (such as PWC and MTU) are created in the engine center's local system and can only be created in Quality Notes via B2B connection. **Engine Center QN responses and updates are submitted via a participants' local system and not Quality Notes directly. Participants will be able to view QN statuses in Quality Notes.**

Technical Data and BAER Review

Pratt & Whitney U.S. is responsible for providing appropriate and valid jurisdiction, classification and licenses required for exporting QN documents, including technical data to any foreign entity. Problem Description, Additional Problem Description-Long Text Description fields at the QN Header and QN Defect Line level are considered technical (sensitive) data. Attachments at the QN Defect Line level are also considered technical data.

There are three cases when users can view technical data:
1. The user is located in the United States.
2. The Jurisdiction and Classification (J/C) was validated in Quality Notes and no license is required for that specific J/C.
3. The user has a license assigned to them.

Technical data can be viewed by any participant in the disposition chain as long as the participant has technical data access. If you are unauthorized to view technical data when reviewing QNs or viewing Excel downloads of QNs, the QN requires Business Area Export Review (BAER) to acquire proper J/C and license. A QN routed to a participant in the chain who is unauthorized to view technical data requires BAER review.

Additional Problem Description and Long Text Information Fields

When data is updated in additional information fields such as Additional Problem Description-Long Text in the QN Header or fields such as Defect Description Additional Information and Root Cause Additional Information in the QN Defect Line, timestamp information (MM/DD/YY and UTC) displays. If **View/Change (No Data)** displays, no information was entered. When information is updated in these fields, the date reflects the date the update was completed. To view, click **View/Change**.

Additional information and long text fields contain participant responses. Once a QN has been submitted, additional and long text fields are considered technical data. All user roles require technical data access to view. QNO's will be able to provide responses in these fields as long as they have technical data access.

QN Header:

QN Line Details:

BAER Reviewer

When a QN is routed to a participant outside of the United States, the BAER Reviewer steps in to ensure foreign participants have authorization to view sensitive information (technical data).

In order for users to view technical data, the BAER Reviewer must apply the appropriate licenses to the QN (this happens on the defect line level). Once the license is applied/updated, the QN is sent to the next participant in the disposition chain.

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Apply Technical Data License(s)

Applying licenses can be done by logging into Quality Notes. It is important to note BAER Reviewers can only add or update license information if the QN is in BAER Review state at the defect line level.

1. Locate the QN and click **View Technical Data**.

2. To add/update a license to a QN defect line to authorize technical data access, click **View/Change** in the **Licenses** column. You can only apply licenses to QN defect lines in the BAER Review state. If viewing multiple lines, you may need to filter lines to BAER Review.

3. Enter/update license information and click **Save**.

Licenses			
Company	Country	License Number	License Exp. Date (mm/dd/yyyy)
BAER Reviewer	US	NLR	01/01/2200
MTU1			
PWA	USA	NLR	01/01/2200
PWAT2			
PWCC1		5035423547.52654.241254	12/31/2019
PWCC1-920010	CAN	843685426.546325.84285	12/31/2018

Cancel   Save

Apply Report License(s)

When a request to print is made, a QN line state may not reflect BAER review. However, the request is sent for BAER review. The BAER Review must apply a Report License in order for the user to print.

1. Locate the QN.
2. Click **View Technical Data**.
3. Select **Report Jurisdiction** and Report **Classification** (located at the QN Header level).

– QN Details			
Vendor Name:	Hamilton Sundstrand	Author Last Name*:	Evans
Author First Name*:	Davida	Author Phone Number:	
Author Email Address:	davida.evans@exostar.com	SQA/SMC Representative:	
SQA/SMC Email Address:		Supplier Sub-Tier:	View (No Data)
Buyer PW Clock:	453-1000	Buyer Last Name:	Inglis
Buyer First Name:	Joe	Buyer Phone Number:	111-222-3333
Detail Part No.:			
MATERIAL:			
Material Number:	PW-1700-8	Vendor Material/Part No.:	
Operation Number*:	12	Total Quantity NC Material*:	2
Total Parts Inspected*:	5	Cost Consideration:	
QN Priority Type:			
SUBJECT:			
Subject Category*:	Vendor Subject Categories	Subject Code*:	PW Discovered Vendor N/C
Problem Description*:	rusting and denting	Additional Problem Description - Long Text:	
State (Header):	BAER Review	Report Licenses:	View/Change
Report Jurisdiction*:	EAR	Report Classification*:	

4. If you are unable to view/update the J/C for report license (in the QN Header), ensure you have defect lines filtered to BAER Review state.

5. Click **View/Change** in **Report Licenses** column. Click **Save** if entering/updating license information.

Licenses			
Company	Country	License Number	License Exp. Date (mm/dd/yyyy)
BAER Reviewer	US	NLR	01/01/2200
MTU1			
PWA	USA	NLR	01/01/2200
PWAT2			
PWCC1		5035423547.52654.241254	12/31/2019
PWCC1-920010	CAN	843685426.546325.84285	12/31/2018

Cancel   Save

6. Click **Submit QN**. The defect line transitions to the next participant in the chain.
7. Once report license is applied, the user can print.

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Apply Baseline J/C

If attachments are added or changes are made to technical data fields after QN creation requires BAER review for proper J/C and license(s). Applying Baseline J/C can be done by logging into Quality Notes.

1. Locate the QN and click **View Technical Data**.

2. If J/C was not automatically applied, select **Report Jurisdiction** and Report **Classification** (located at the QN Header level).

3. Select **Baseline Jurisdiction** and then **Baseline Classification**. Baseline Classification menu options are dependent on what was selected for Baseline Jurisdiction. Ensure the box in the defect line you are applying J/C to is checked and click **Save Draft/Verify License**.

4. Click **Submit QN**. Baseline J/C is applied and the QN is routed to the next participant in the disposition chain.

BAER Rejection

When the BAER Reviewer initially rejects a QN defect line, all QN defect lines associated with the QN move together, transitioning back to the previous state for resubmission. After the initial rejection, each line then goes through its own, independent disposition workflow. For example, if the QNO submits a QN and it goes to BAER Review and the BAER Reviewer rejects a single line, all lines are rejected. Any time after this, the lines transition independently during the workflow. Subsequent rejections only reject a single line.

1. Locate the QN and click **View Technical Data**.

2. Select the **Defect Detail** line by checking the defect line box (if required). Please remember upon initial rejection, all QN defect lines are rejected. After initial rejection, the QN defect lines transition independently during the workflow. Subsequent rejections only reject a single line. Click **BAER Reject**.

3. The line(s) will transition to a BAER Rejected State.


Email Alerts

By default, when one or more QN lines are put into BAER Review state, an email alert is sent to BAER reviewers. You have the option to subscribe or unsubscribe to email alerts.

1. To subscribe/unsubscribe to email alerts, go to **Email Alert Subscription** from the Navigation Tree.

2. Select the email alert you want to subscribe/unsubscribe to and click **Save**.
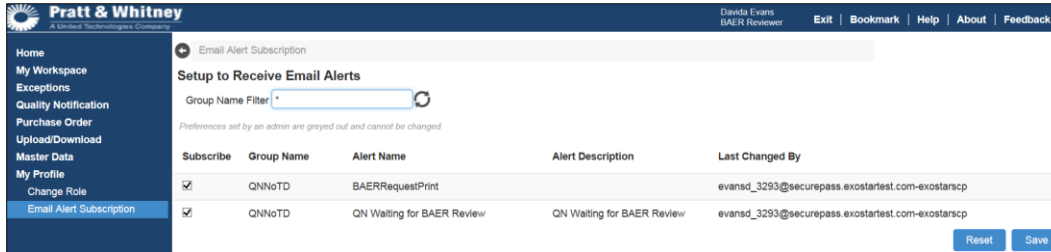
Exceptions Queue

QNs that are waiting for BAER Review or are waiting for print approval can be access from the Navigation tree. Click Exceptions then Quality Notification. You can complete a summary search to filter the information that displays in the results field.
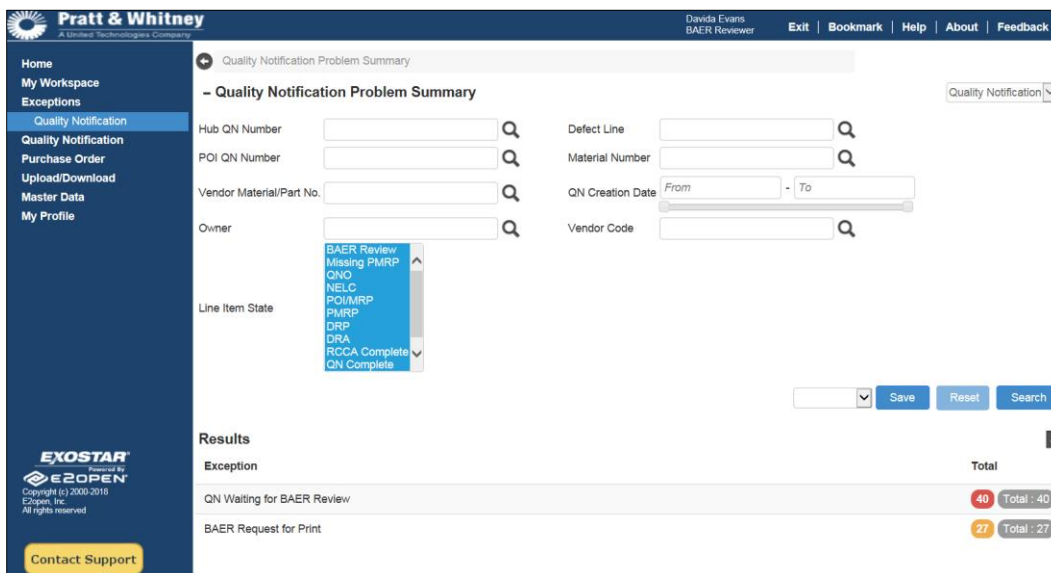
Master Data

Master Data is accessible from the Navigation Tree but will <u>not</u> be used by BAER Reviewer.