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Date:	10/26/2021	Date:	10/29/2021	Date:	

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1 Purpose

This work instruction outlines the steps needed to create a supplier deviation request (SDR) through PROTERRA’s internal PLM system (Arena). The purpose for a supplier deviation request is to deviate from the original part drawing, material substitution, CAD, and or other substitutions from the original part ordered by Proterra sourcing or engineering.

2 Creating the SDR Step

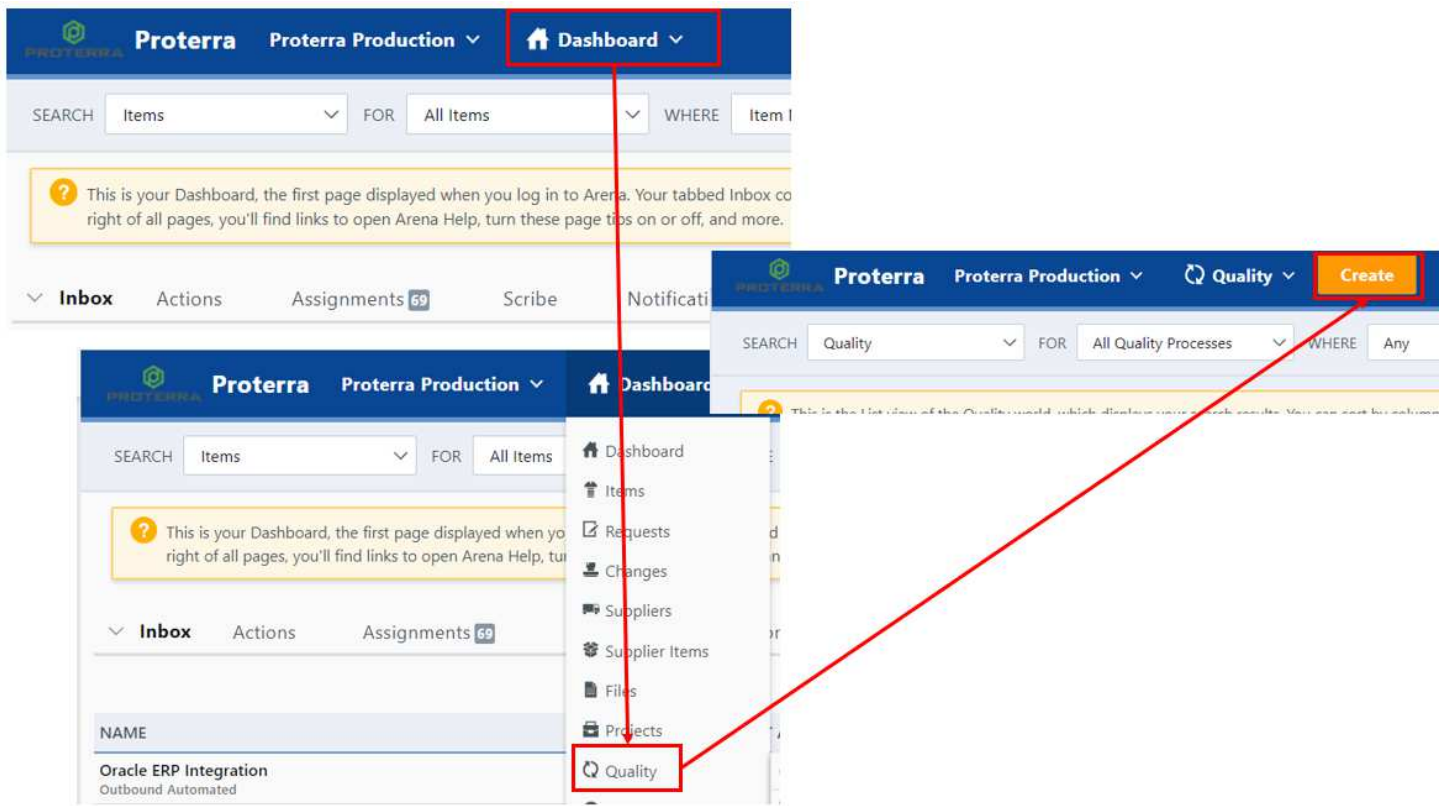


Steps:

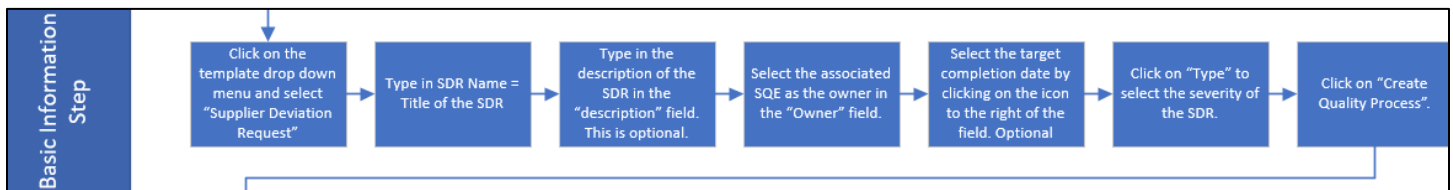
1. Go into Arena.
2. At the top left of the screen, hove over the dashboard icon and click on quality.
3. Click on the create option right of the quality icon.

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4. Click on create.



3 Basic Information Step



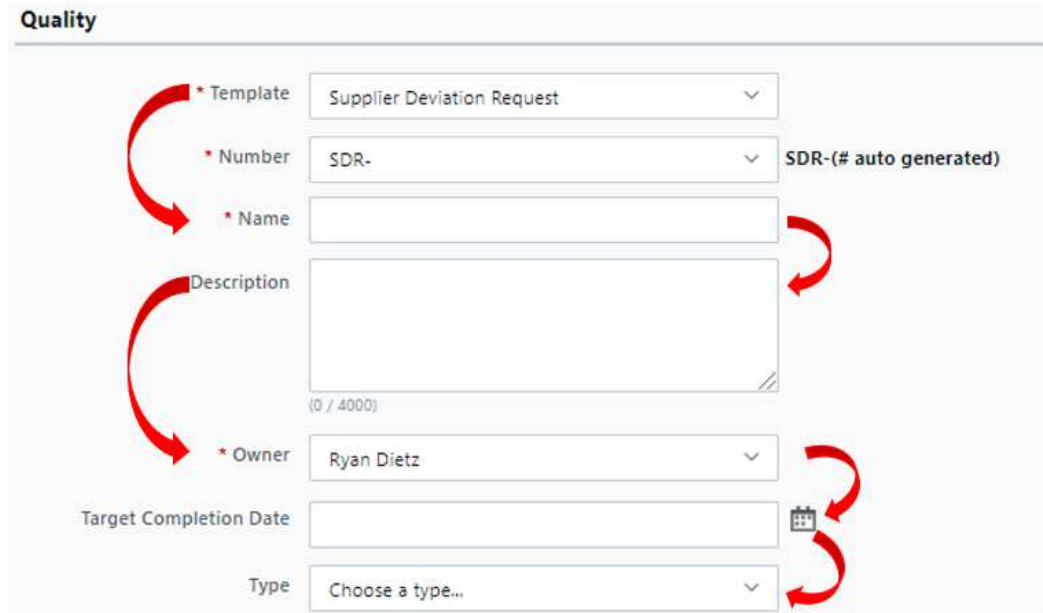
Steps:

1. Click on the template drop down menu and select supplier deviation request.
2. Type the name of the SDR (Title) into the appropriate field below.
3. Type the description of the SDR. *This is optional as you will have to do this at a later step as well.*
4. Select the appropriate SQE as the "Owner" of the SDR.
5. Select the targeted completion date that you wish to have a response back from the SQE.
6. Click on the severity of the deviation, which is the following:
 - a. A – Major Disruption/Failure to Meeting Regulatory Requirements
 - b. B – Moderate Disruption

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c. C – Minor Disruption

7. Lastly, click on “Create Quality Process”.

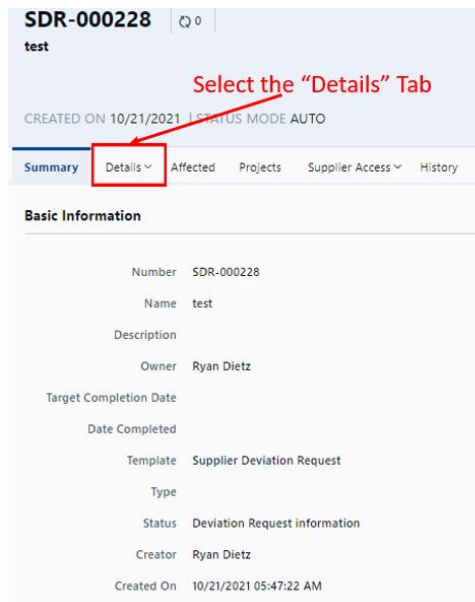


8.

4 Deviation Request Information Step

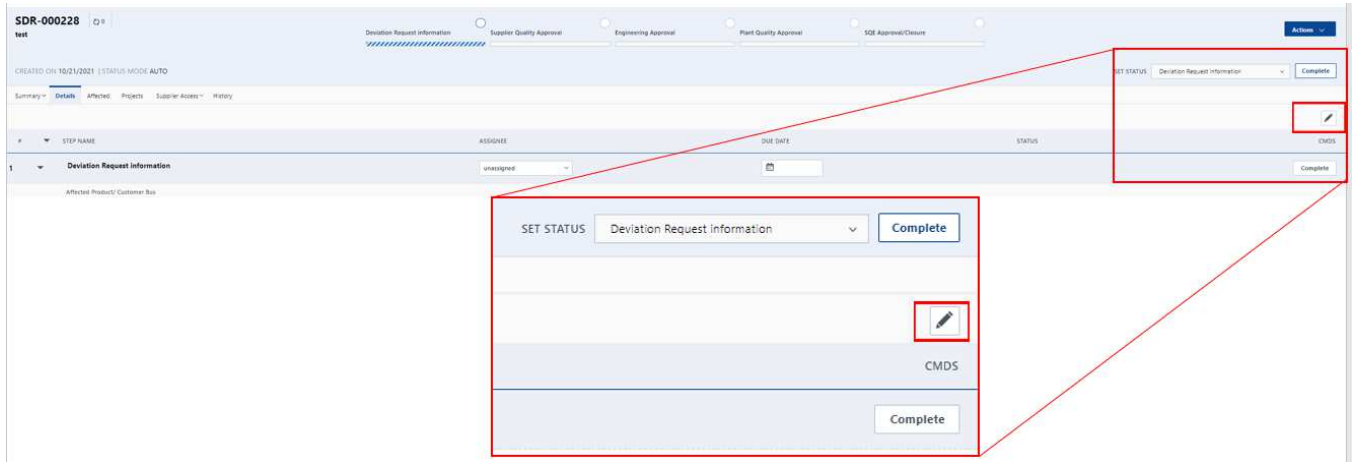
Steps:

1. Click on the details tab of the summary page.



2. In details, click on the pencil icon to make edits to the SDR.

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3. Once there, you can insert your information into the fields below such as affected product, deviation requested, deviation description, part name, part number (Proterra part number), Proterra sites affected, Supplier, root cause, corrective actions to prevent this in the future, and preventative action and then press save at the very bottom right of the screen.

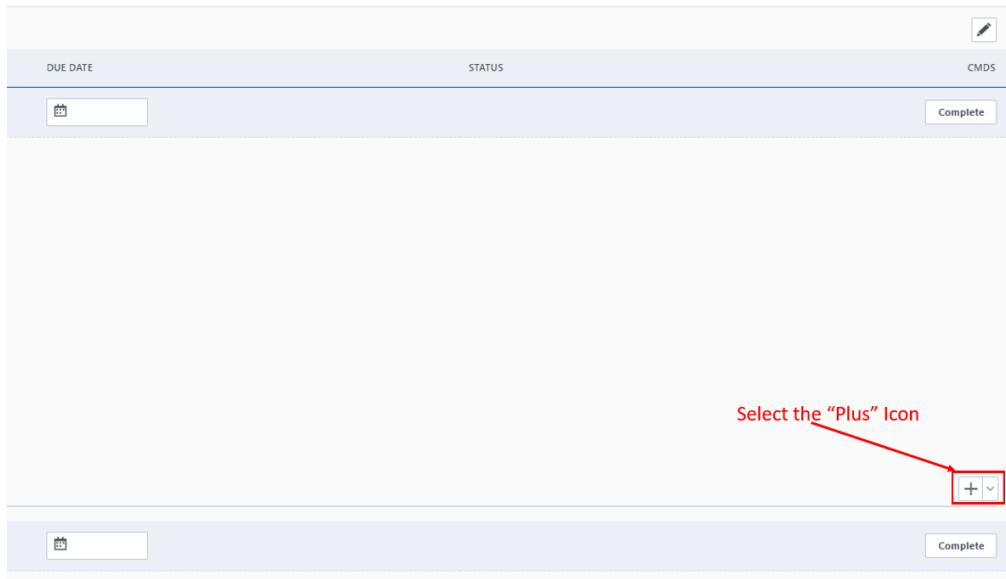
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#	STEP NAME
1	Deviation Request information
Affected Product/ Customer Bus name <input type="text"/>	
<small>(0 / 4000)</small>	
Deviation Requested <input type="text"/>	
<small>(0 / 4000)</small> <small>Attach ppt, Redlines, DWG, pics</small>	
Deviation Description <input type="text"/>	
<small>(0 / 4000)</small> <small>Defective serial #, Lot #s, Mntg</small>	
* Part Name <input type="text"/>	
* Part Number <input type="text"/>	
Protterra Sites Affected <input type="text" value="None Selected"/>	
* Supplier <input type="text"/>	
* Root Cause <input type="text" value="Select one..."/>	
* Corrective actions <input type="text"/>	
<small>(0 / 4000)</small>	
Preventive Action <input type="text"/>	
<small>(0 / 4000)</small>	

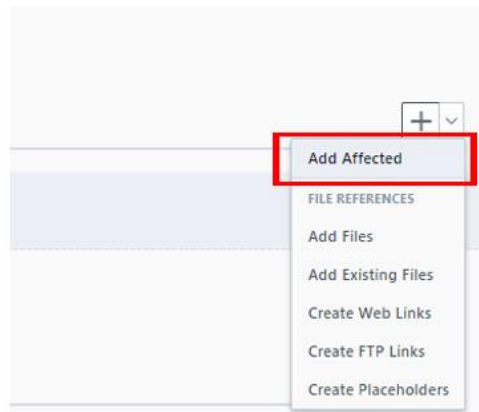
<input type="text"/>	<input data-bbox="1149 1402 1187 1444" type="button" value="+"/>
<input data-bbox="1079 1486 1187 1528" type="button" value="Complete"/>	
<input type="text"/>	<input data-bbox="1149 1556 1187 1598" type="button" value="+"/>
<input data-bbox="976 1766 1073 1797" type="button" value="Cancel"/>	
<input data-bbox="1084 1738 1224 1822" type="button" value="Save"/>	

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- Next, you will need to click on the “+” icon on the bottom right of the screen for the deviation request step.

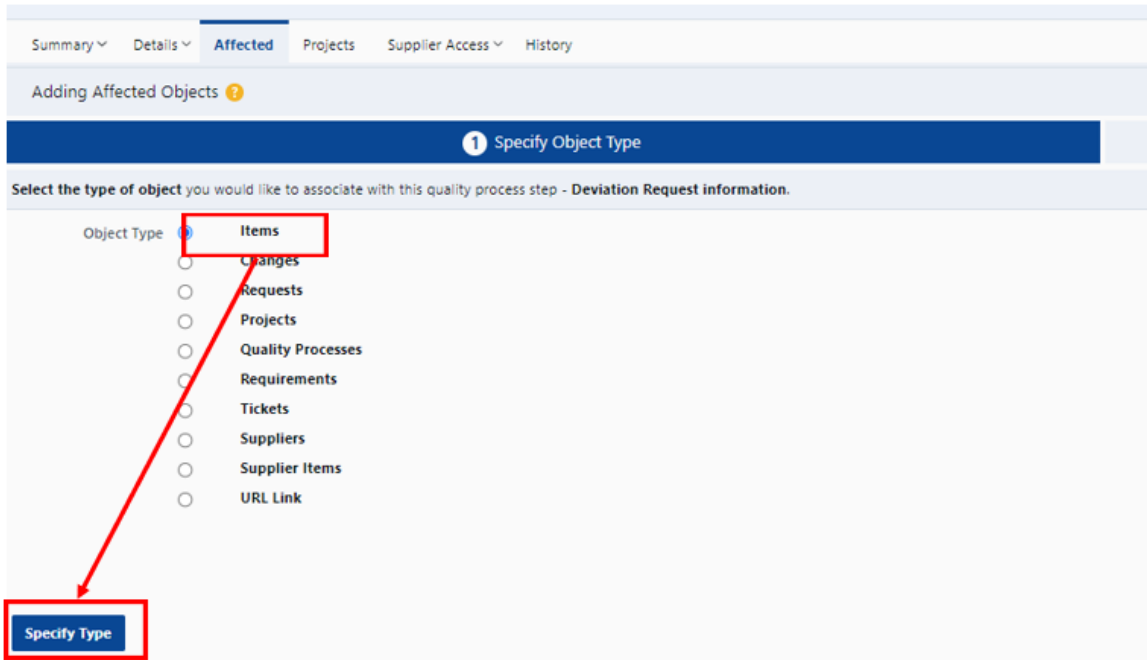


- Next, click on “Add Affected” to add the part number and its appropriate revision level to the SDR.



- Next, click on “specify type”, then put the Proterra part number into the search bar and then click “search”.

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Summary ▾ Details ▾ **Affected** Projects Supplier Access ▾ History

Adding Affected Objects ?

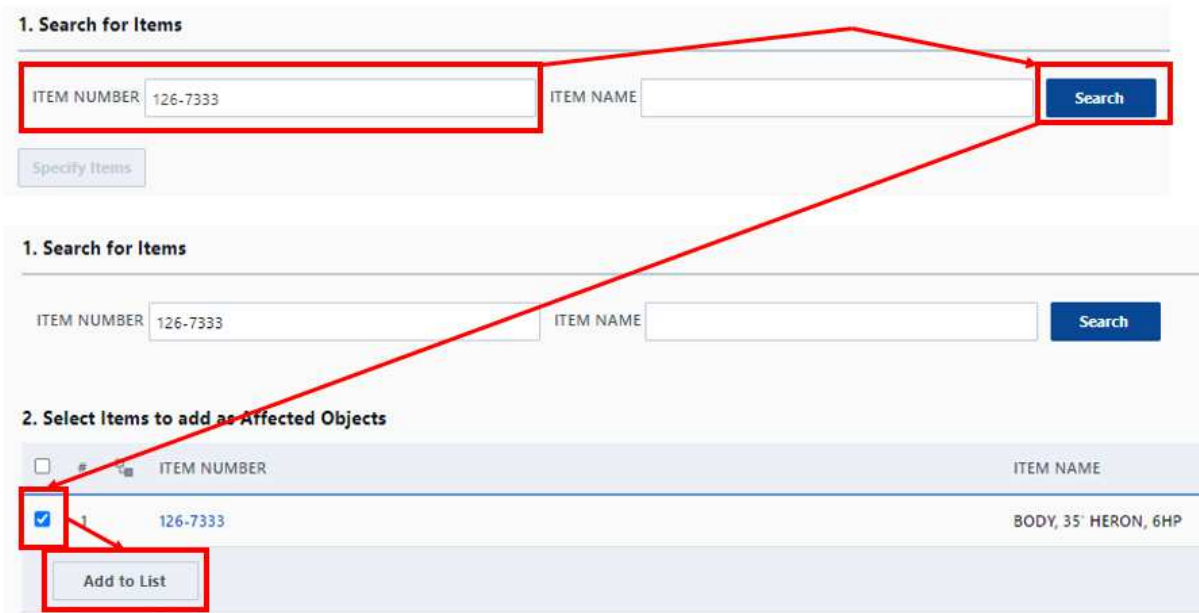
1 Specify Object Type

Select the type of object you would like to associate with this quality process step - Deviation Request information.

Object Type **Items**
 Changes
 Requests
 Projects
 Quality Processes
 Requirements
 Tickets
 Suppliers
 Supplier Items
 URL Link

Specify Type

7. Next, click the checkbox and “add to list” once the part you selected is verified.



1. Search for Items

ITEM NUMBER 126-7333 ITEM NAME **Search**

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ITEM NUMBER 126-7333 ITEM NAME **Search**

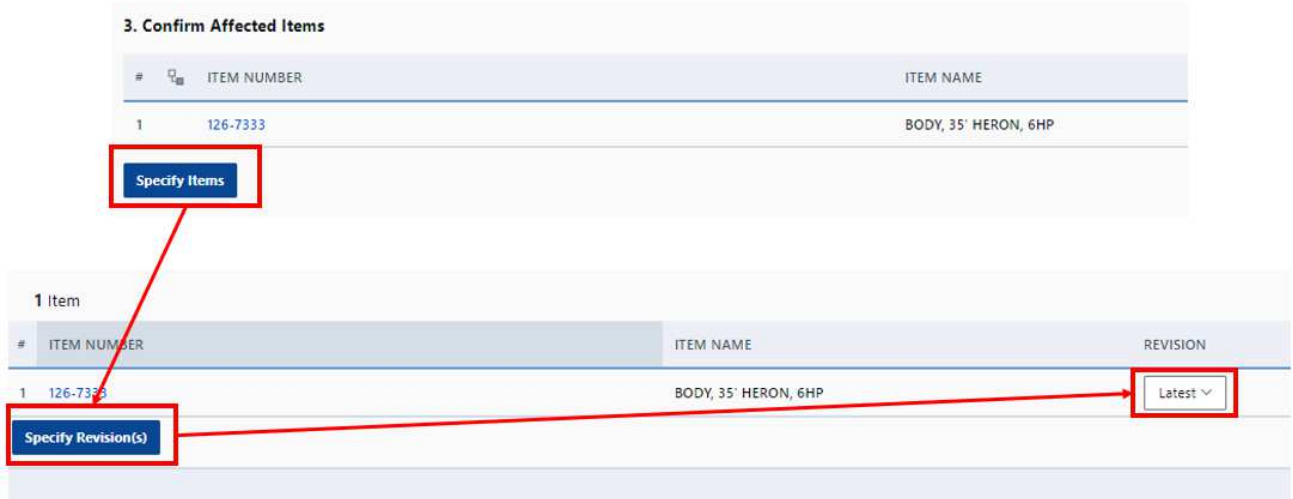
2. Select Items to add as Affected Objects

<input type="checkbox"/>	#	ITEM NUMBER	ITEM NAME
<input checked="" type="checkbox"/>	1	126-7333	BODY, 35' HERON, 6HP

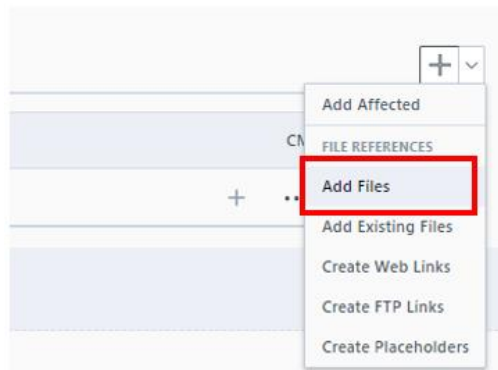
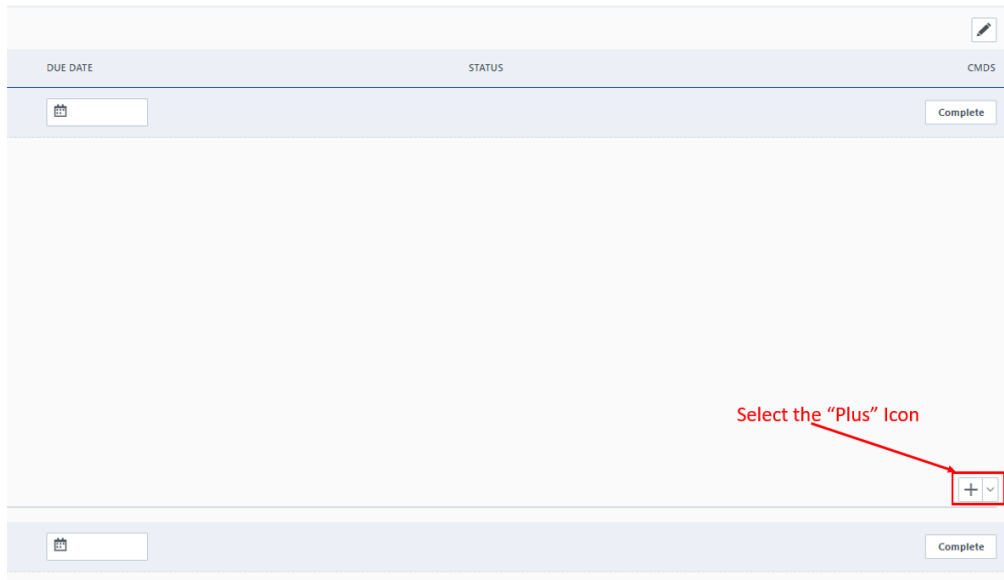
Add to List

8. Next, click “specify items” and then “specify revision(s)” to select the appropriate revision level of the Proterra part.

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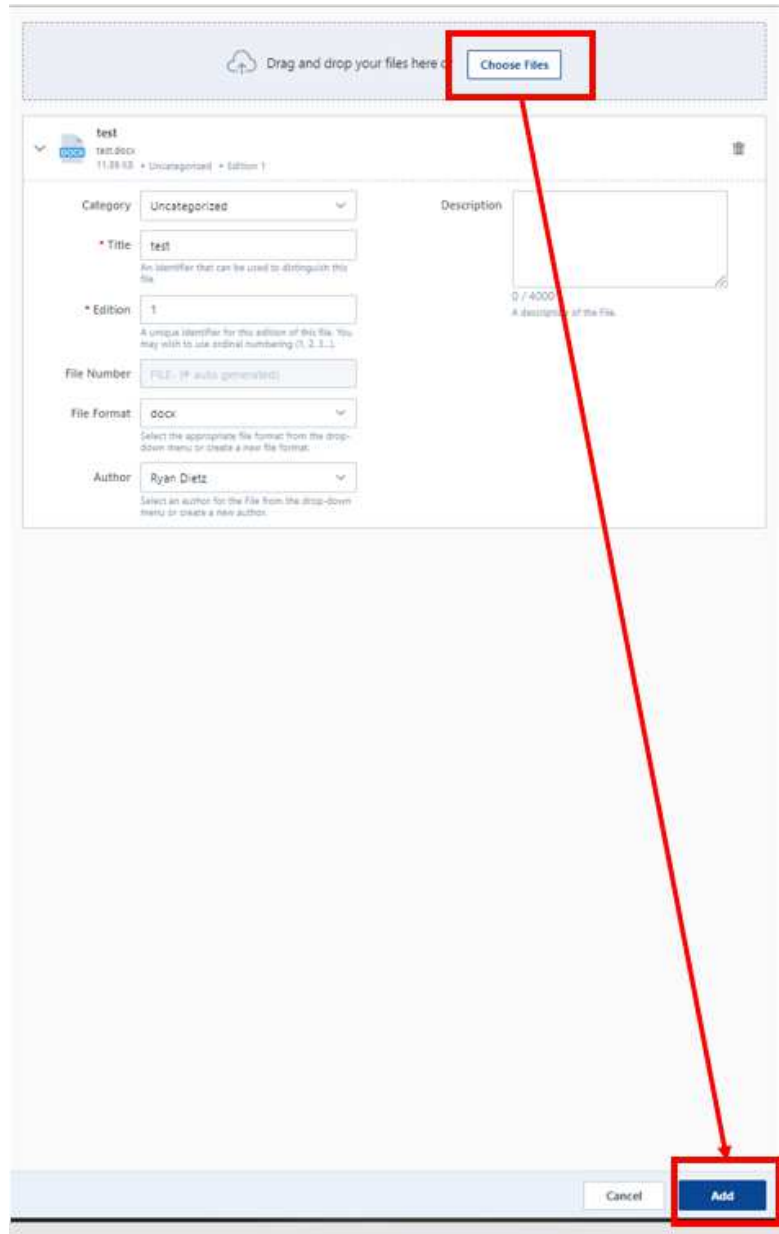
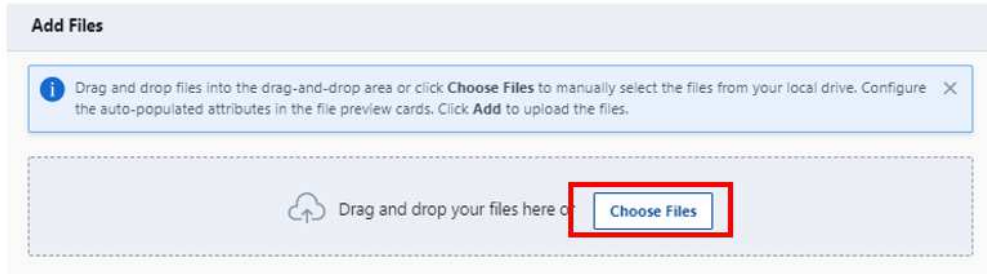


9. Once finished, you can select any documents (if needed) for the SDR to add to Arena by selecting the “+” button that you previously selected and then click on “Add Items”. If no documents are needed, skip step 10.



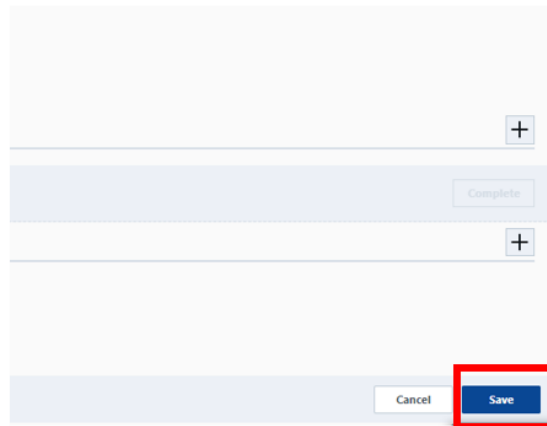
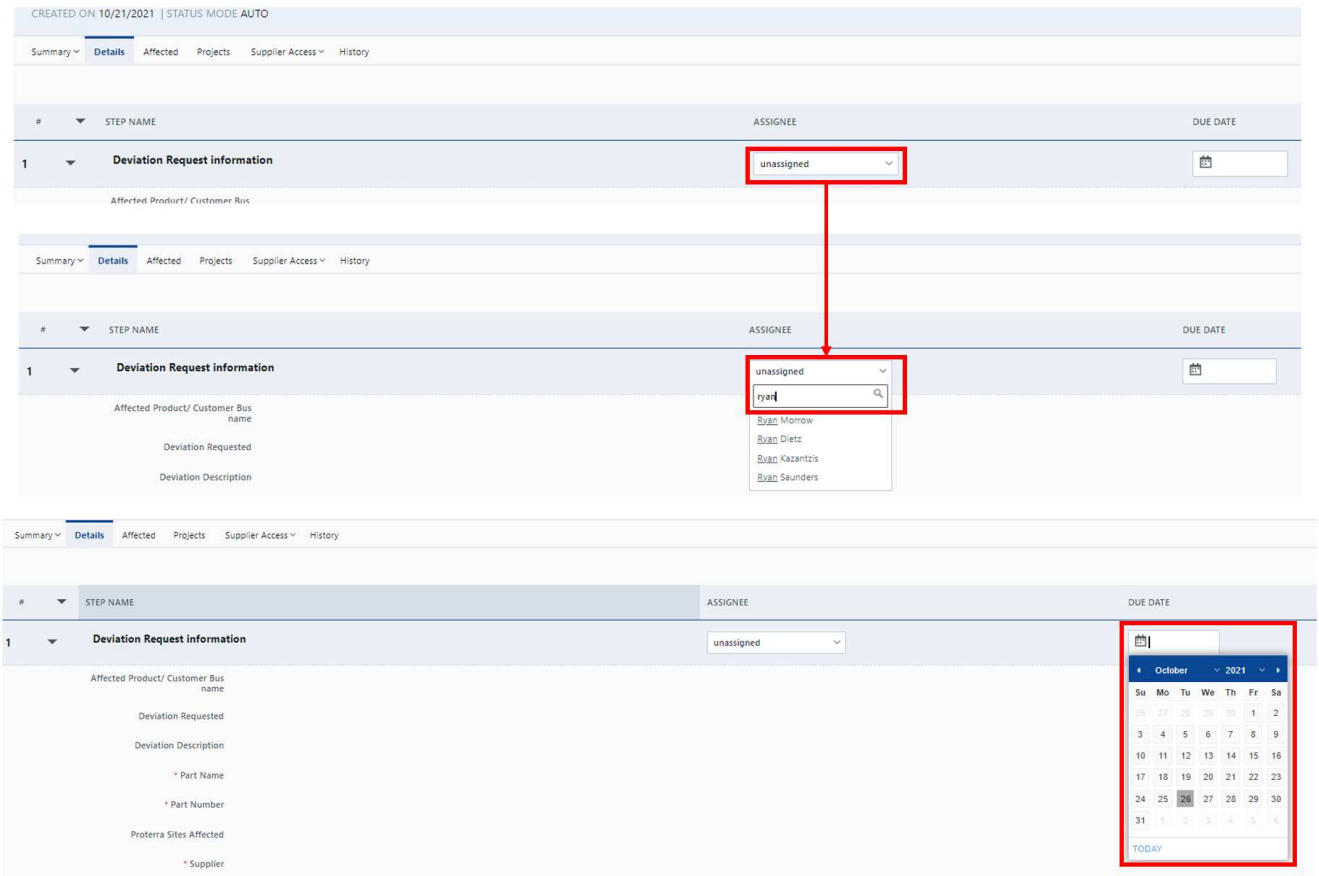
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10. Next, select choose files and then upload the appropriate files needed for the SDR and then click “add” at the bottom to attach the files.



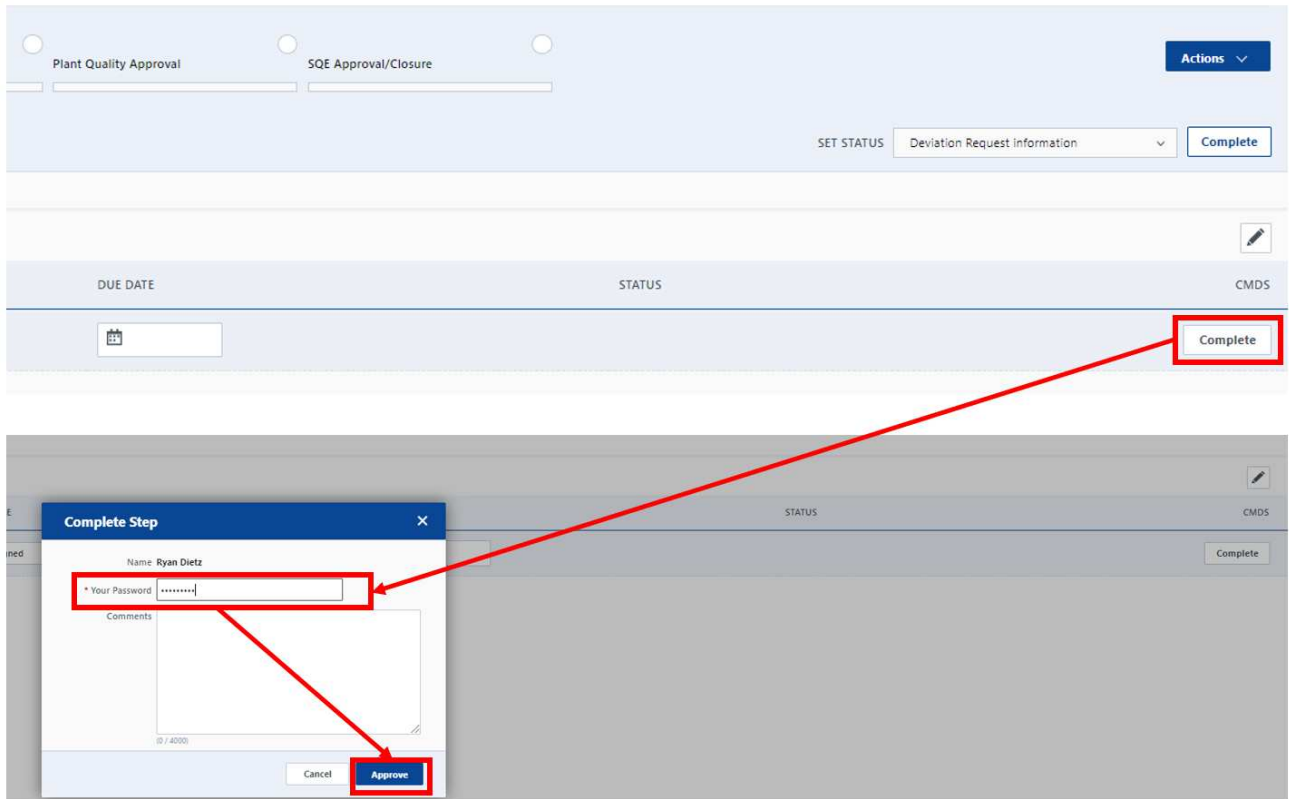
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- After the documents are uploaded or no documents are uploaded, click on the assignee and date field at the top of the step. Select your name by typing it into the field and then select the date you wrote the SDR on. Once done, select “save” at the bottom of the screen.

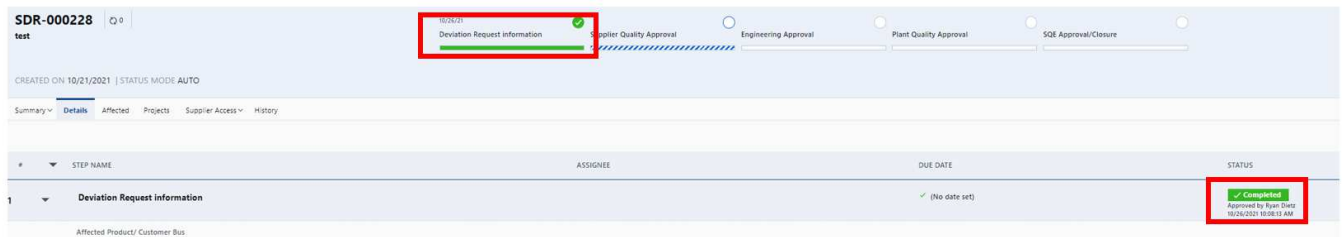


- Once all the information, documents, and part number are provided into the details section of the SDR, click on the “complete” icon at the top right corner of the details step.
- Type in your Arena password and press “Approve” to complete the step.

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14. This is what the screen should look like once the deviation request information section is completed.



5 Supplier Quality Approval Step

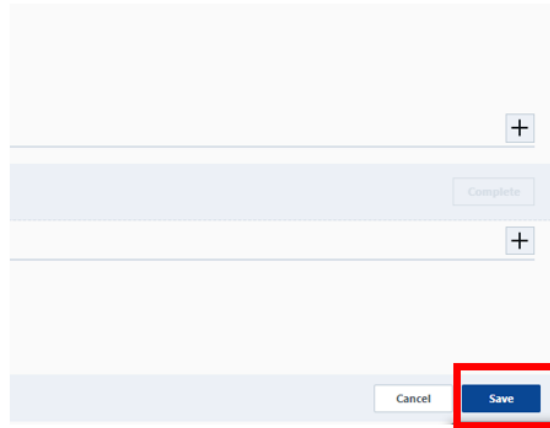
Steps:

1. Click on the “Assignee tab” and type in the name of the SQE who owns this supplier part number. Next, select the date you wish to have the SQE approve this by.



2. Lastly, click “save” at the bottom of the screen.

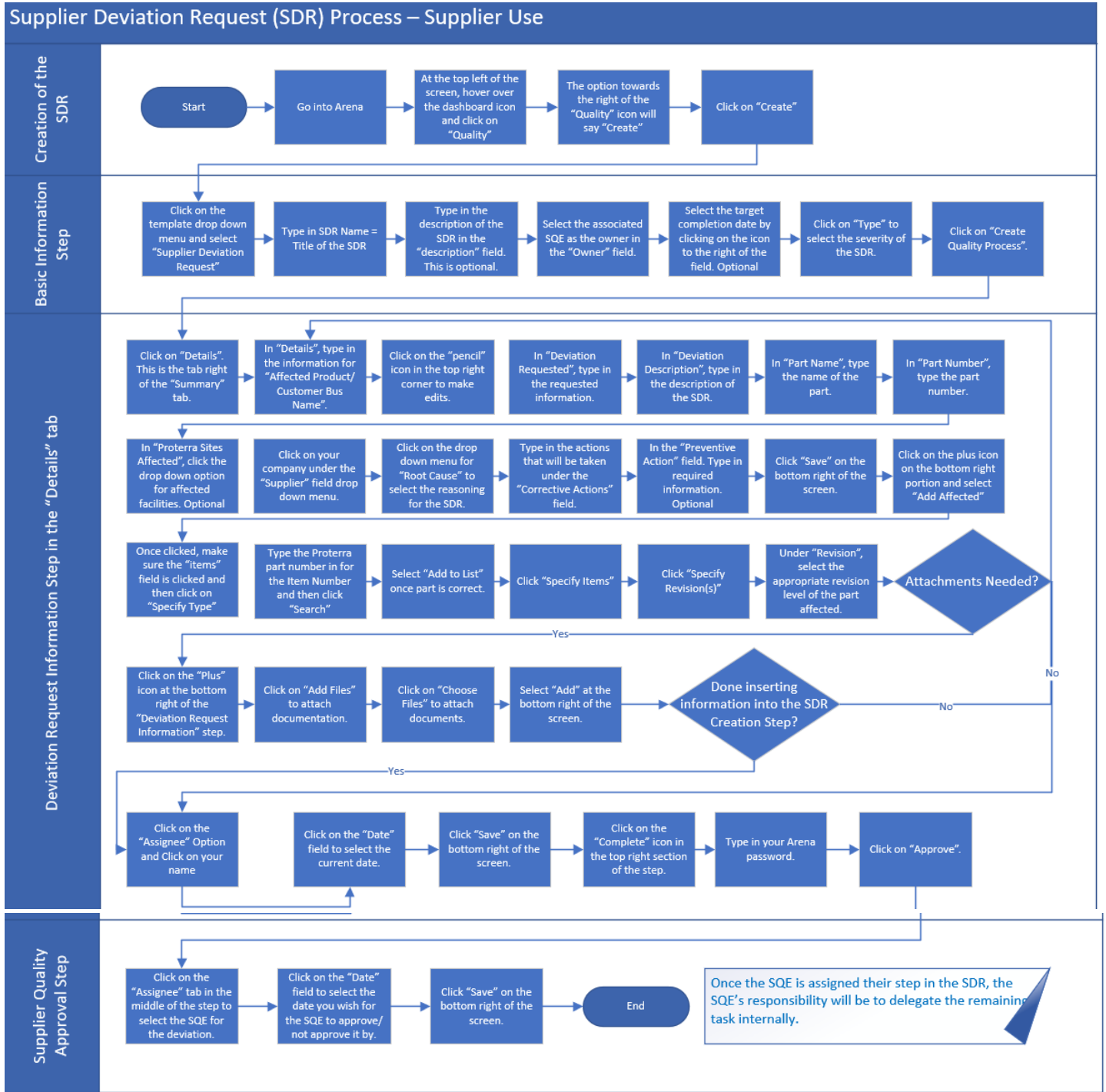
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The image shows a screenshot of a web form interface. At the top right of the form area is a plus sign (+) button. Below it is a light blue horizontal bar containing a 'Complete' button. Underneath the bar is another plus sign (+) button. At the bottom of the form, there are two buttons: a 'Cancel' button and a 'Save' button. The 'Save' button is highlighted with a red rectangular border.

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6 Process Map



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Supplier Deviaton
Process Map_Supplier

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