

Certificate Management - User Manual

Equipment Description: Certificate Management Application - Supplier Instructions Part Number: Manual input





NOV References

Document Number: 115385167 Revision: 07 Volume: 1 of 1





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REVISION HISTORY

01 Rev	22-Jun-2021 Date	Reason for issue	CRBL Prepared	MV Checked	HT Approved
02	19-Aug-2021	Approved for Use	CRBL	MV	HT
03	19-Aug-2021	Approved for Use	CRBL	MV	HT
04	26-Oct-2021	Approved for Use	CRBL	MV	HT
05	28-Dec-2021	Approved for Use	CRBL	MV	HT
07	22-Jun-2022		CRBL	MV	CRBL

CHANGE DESCRIPTION

Revision	Change description
07	Updated section 2.1.1 to highlight that both traceability information and document upload are
	required for document submission for traceable parts
	Updated section 2.1.1 to highlight the NOV traceability number should be included if applicable
	Updated section 2.4 to elaborate on the instructions for resubmitting a rejected document
05	Revised title of section 2.1.2 from "Serial Number Generator" to "Add Traceability Sequence"
04	Added section 2.1.2 Serial Number Generator
03	Updated section 'Traceable Documentation'
02	Updated 'Register for Access' and 'Navigating to Certificate Management' sections
01	



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1 GETTING STARTED

NOV wants to standardize the way our suppliers provide documentation to our organization. The Certificate Management application is meant to provide our suppliers a simple and uniform method to identify and submit documentation as communicated though our purchase order (PO) package. Documentation requirements required by NOV have not changed and will continue to be communicated through the PO as well as related documents including the drawing, specifications, emails, etc.

1.1 Things to Know

- a. Scope:
 - i. This application is for submitting <u>Traceable and Non-traceable documentation only</u>.
 - 1. OSP documentation is currently not supported and should continue to be submitted through the current method.
 - ii. This application is for submitting <u>NOV Operations documentation only</u>; NOV Aftermarket documentation should continue to be submitted through the current method.
- b. It is recommended to use Chrome or Firefox as the browser
- c. Document submission through the Certificate Management application replaces hard copies. **DO NOT SEND HARD COPIES.**
- d. Documents should be submitted using PDF format.
- e. When there are multiple documents in a single packet, the file should be bookmarked.
- f. Data transfer from ERP to Cert App usually takes place within 24 hours but could extend to 48 hours.
- g. Email Notifications are currently supported for Rejected items and Approved with Comments items; suppliers should check the Certificate Management application regularly to review/action other pending items.
- h. When resubmitting a previously rejected document, please use the **Rejected** screen.

1.2 Register for Access

- a. Users can request access via the <u>Cert App Registration & Troubleshooting Form</u>
 - a. The registration form can also be found at https://supplier.nov.com/
- b. Once the account has been created, the user(s) will receive a NOV ID email similar to the one below.
 - a. Open and click Activate Account link for the authentication step.

Hi Crissy.Leblanc@nov.com,	
Welcome to NOV ID!	
To verify your email address and activate your account, please click the foll Activate Account	owing link:

b. Once you have registered, you will see the NOV ID Dashboard page. Ignore this page, you need to navigate to <u>Supplier.nov.com</u> to access Certificate Management.

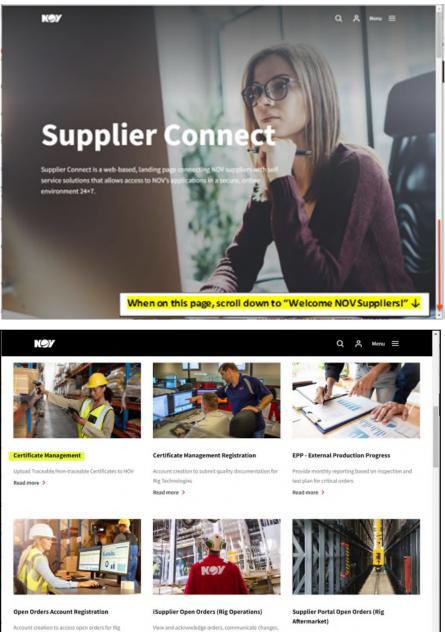


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- c. To review your account settings and to change your password, if necessary, you can navigate to <u>login.nov.com</u>.
- d. Click-by-click how-to videos can be found at <u>Rig Technologies Supplier Training</u>

1.3 Navigating to Certificate Management

- a. Navigate to Supplier Connect, Supplier.nov.com
- b. Scroll down and Select Certificate Management



and submit invoices for payment.

Read more >

View and acknowledge orders, communicate changes, and submit invoices for payment Read more >



Operations

Read more >

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2 HOW TO USE THE CERTIFICATE MANAGEMENT APPLICATION

Parts can be foun

The following chapters will guide the user through the different sections of the Certificate Management application.

2.1 Add Certificates

2.1.1 Traceable Documentation

- a. Enter the purchase order (PO) number and part number (PN), description, or Manufacturers PN
- b. Select Add Certificate



Specify Purchase Order and Part Number	
006500	
00500	
7875099-001	

- c. **Please note: both the traceability section AND the document upload section are required to submit documentation**
- d. In the middle section of the screen, select the green icon to add traceability number(s).



- e. Select the traceability type from the drop-down menu
 - i. For traceability input, enter one traceability number at a time. Under no circumstances can multiple traceability numbers be entered into a single field (see example on next page)
 - 1. If the part has been given a NOV traceability number, this number should be included here. Enter the value on a separate line in addition to any other traceability numbers.
 - ii. There should only be one documentation package uploaded per Part Number and Serial Number (PN/SN) or Part Number and Lot Number (PN/LN)
 - Exception: When the documentation provided is applicable to more than one serial number (note that lot number is *not* included in this exception). Please refer to <u>section 2.1.2</u> for instructions on how to use the 'Add Traceability Sequence' feature.
 - 2. In this case, the documentation package can be for a Part Number and multiple Serial Numbers as applicable



- 3. For example, when multiple serial numbers are noted on the majority of documents produced for a specific part number, a single document package is acceptable
- 4. If there are any questions, please contact your NOV quality representative
- f. Once the applicable traceability number or numbers are added, click save changes

	C	ertificate Management		
Purchase Order Details Purchase Order Bostos Purchase Order Bostos Part Bane Rodeland Bostos Par	Add Traceability TRAC Circle	Traceability Number	avese to uploa	et al.
TRACE. Click her	Add Traceability Traceability Type Serial Number ~ Serial Number ~ Serial Number ~ Serial Number ~ Serial Number ~ Serial Number ~	Traceability Number 916291-1-1 916291-1-2 916291-1-3 916291-1-4 916291-1-5 916291-1-8	× ÎII ÎIIII ÎIIIIII ÎIIIII ÎIIIII ÎIIIII ÎIIIIIII ÎIIIII ÎIIIIIIII	to upload or click on browse

- g. Drag/drop or browse to add the **completed or revised** certificate package to the file section and select send to NOV.
 - i. There should only be a single document added per submission
 - ii. File size must be 100MB or less
 - 1. If the file size cannot be reduced and kept legible, the file must be broken into multiple documents, but uploaded in the same PO/PN submission. The 100MB cap is applied to each document (not total).
 - 2. If multiple documents are uploaded for the same PO/PN combination a warning pop-up message will appear but will not prevent submission.
 - iii. File type should be PDF and bookmarked

		Cor	tificato N	Innament				
	You NOV		e certificate shou	ata after the certificate has Id be sent to NOV by clickin ICEL. Cancel				
Purchase Order Details	TRACEABIL	ITY 🛞		T Drag certific	ate files here, or brow	se to upload		
	Туре	Number		Filename	Туре	Size		
Purchase Order 852665	Serial No.	1234		Cert doc 1	Adobe PDF	24.931 KB	1	$\leq \Box$
Part Number 16513128-001								
Part Name Nut;Hex;L500-8 UN-28;Matl ASTM A194 Grade 2H;Zinc-Nickel Plated								
Manufacturer 020356								
Send to NCV								



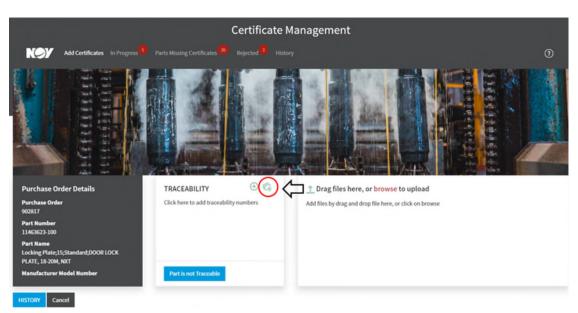
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- h. Upon successful submission a confirmation note will appear.
 - i. To add certifications for a **different** PO/PN combination, select the "Click here to add more certificates" link (first link listed)
 - To submit additional certificates and traceability information for the same PO/PN combination you just submitted for, select the "Click here to add more certificates to same PO/Part combination" link (second link listed)

Certificate has been submitted to NOV! Click here to add more certificates Click here to add more certificates to same PO/Part combination						
Purchase Order Details Purchase Order	TRACEABILITY	Number	Certificate Files Filename	Туре	Size	
918057 Part Number 11459578-001 Part Name Base;Ram Changer, 18-15M, NXTM;800P (Blow Out Preventer) Manufacturer Model Number	Lot No.	545	P0#_P0 Line_PN_Serial or Lot#.docx	Microsoft Word	11.517 KB	ų

2.1.2 Add Traceability Sequence

- a. Things to note:
 - i. The 'Add Traceability Sequence' feature would/could be used when the user/supplier is submitting a large sequence of serial numbers to NOV, rather than manually entering each SN into the Traceability section
 - ii. The 'Add Traceability Sequence' feature can generate up to 1,000 consecutive serial numbers (should not exceed 1,000 SN's)
 - iii. The SN's can be alphanumeric but must end in a number
 - iv. The SN's must start with the same base
 - 1. Example: <u>ABC1 ABC15</u> is correct as "ABC" and "ABC" are equal bases
 - 2. Example: <u>ABC1 DEF15</u> is incorrect as "ABC" and "DEF" are **not** equal bases
 - v. The SN's can contain a dash or multiple dashes ("-")
 - 1. Example: 92033-4-1 thru 92033-4-10 is acceptable
- b. Select the 'Add Traceability Sequence' feature from the Traceability section





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c. Select "Serial Number" from the Traceability Type drop down menu. Then enter the first and last serial number in the sequence in their respective fields.

Traceability Type	Serial Number	~
First Number		
Last Number		
Generate		

- d. Click the Generate button when ready to complete the sequence of SN's. The sequence of SN's will populate below the Generate button for the user to review.
 - i. See examples below alphanumeric and/or numeric

Add Traceability Sequ	ence	×	Add Traceability See	quence	×
Traceability Type First Number Last Number Generate Numbers to be added:	Serial Number ABC1 ABC5		Traceability Type First Number Last Number Generate Numbers to be added	Serial Number 1 10 10	
ABC1		Ĩ	3		Ĩ.
ABC2			5		<u></u>
ABC3		Ĩ	6		
ABC4		Ĩ	7		Î
ABC5		Î	8		ÎII ÎII
			10		۱.
		Close Save changes		Clo	Save changes



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e. To remove a SN from the sequence, click the corresponding trashcan icon for that particular SN; SN will then be removed from the sequence of SN's

Add Traceability See	quence	×	Add Traceability Sequence	×
Traceability Type First Number Last Number Generate Numbers to be added	Serial Number ABC1 ABC5	~	First Number ABC1 Last Number ABC5 Generate	Number
ABC1		Ē	Numbers to be added: ABC1	Ē
ABC2		i		Î.
ABC3			ABC2	
ABC4			ABC3	iii)
ABC5		Î.	ABC5	
	Clo	se Save changes		Close Save changes

- f. Click Save changes when SN sequence is complete
 - i. SN's will populate in the Traceability section

Purchase Order Details	TRACEABILIT	TY	⊕ K3	1 Drag files here, or browse to upload
Purchase Order 902837	Type	Number		Add files by drag and drop file here, or click on browse
Part Number	Serial No.	ABC1		
11463623-100	Serial No.	ABC2		
Part Name Locking Plate;15;Standard;DOOR LOCK PLATE; 18-	Serial No.	A8C3		
2014, NXT Manufacturer Model Number	Serial No.	ABCS		

g. If additional SN's need to be added, the Add Traceability button or the 'Add Traceability Sequence' feature can be used

Purchase Order Details	TRACEABILI	TY .	⊕ 1%	① Drag files here, or browse to upload
Purchase Order 902817	Type	Number	(i)	Add files by drag and drop file here, or click on brows
art Number	Serial No.	ABC1		
1463623-100	Serial No.	ABC2		
fart Name ocking Plate;15;Standard;DOOR LOCK PLATE, 18-	Serial No.	A8C3		
OM, NXT	Serial No.	ABCS	向	



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i. Example: using the Add Traceability button to add additional SN's to the existing sequence

		N // 046904	TRACEABILIT	ſΥ	
	Add Traceability	×	Туре	Number	
TRACEABILIT	Traceability Type Serial Number	Traceability Number ABC6	Serial No.	ABC1	
Туре	(Close Save changes	Serial No.	ABC2	Ĩ
Serial No.			Serial No.	ABC3	(ÎII
Serial No.	ABC2	Û			
Serial No.	ABC3		Serial No.	ABC5	
Serial No.	ABC5	Û	Serial No.	ABC6	

ii. Example: using the 'Add Traceability Sequence' feature to add additional SN's to the existing sequence

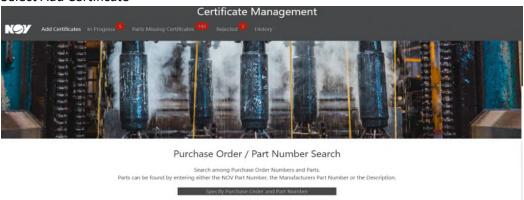
	Add Traceability Seq	uence	×	TRACEABILI	ТҮ	\oplus \square
	Traceability Type First Number	Serial Number ABC7	~	Туре	Number	Ĩ
	Last Number	ABC10		Serial No.	ABC1	۱.
	Generate Numbers to be added:			Serial No.	ABC2	Ŵ
	ABC7		I	Serial No.	ABC3	
TRACEABILIT'	ABC8			Serial No.	ABC5	
Serial No.	ABC9		Î	Serial No.	ABC6	Î
Serial No.	ABC10			Serial No.	ABC7	Ŵ
Serial No.				Serial No.	ABC8	Ŵ
Serial No.		Close	Save changes	Serial No.	ABC9	Γ.Π.



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2.1.3 Non-Traceable Documentation

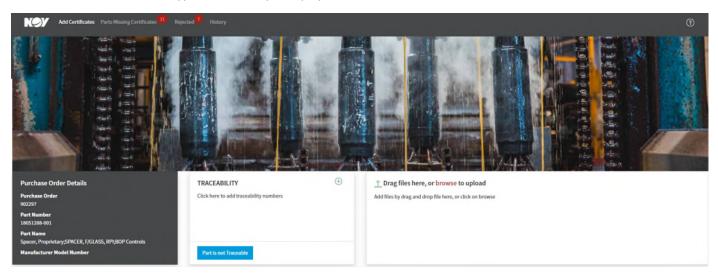
- h. From the Add Certificates screen, enter the purchase order (PO) number and part number (PN), description, or Manufacturers PN
- i. Select Add Certificate

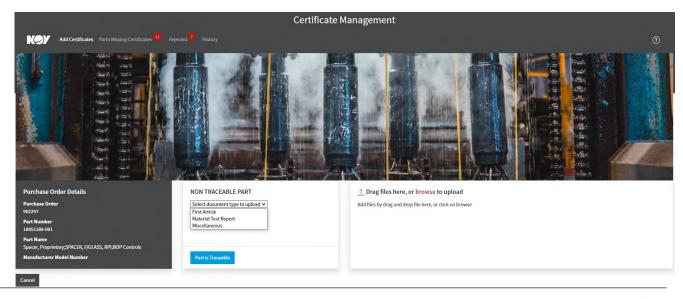


i. In the middle section of the screen, select the blue "Part is not Traceable" button select the document type and subsequently upload the non-traceable documenation

Add Certificate

906500 17875099-001





j. Select the document type from the drop down menu



k. Drag/drop or browse to add the document for upload and select the red "Send to NOV" button

Purchase Order Details	NON TRACEABLE PART	<u>†</u> Drag files here, or browse to uple	oad		
Purchase Order 902297	First Article 👻	Filename	Туре	Size	
Part Number 18051288-001		First Article Documentation.docx	Microsoft Word	12.766 KB	↓ 🗊
Part Name Spacer, Proprietary;SPACER, F/GLASS, RPI;BOP Controls					
Manufacturer Model Number	Part is Traceable				
Cancel Send to NOV					

- I. Upon successful submission a confirmation note will appear.
 - i. To add certifications for a **different** PO/PN combination, select the "Click here to add more certificates" link (first link listed)
 - ii. To add additional certificates and traceability information for the **same** PO/PN combination you just submitted for, select the "Click here to add more certificates to same PO/Part combination" link (second link listed)

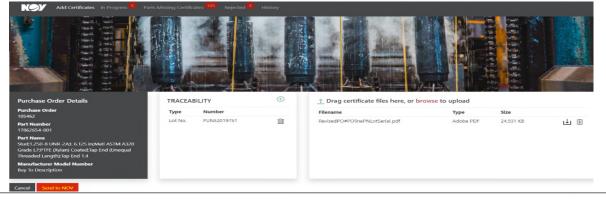
2.2 In Progress

- a. When there is a number visible next to the In Progress section, there are items started but not submitted to NOV.
 - I. There is a filter at the top of this section to refine the search.
 - II. The supplier should routinely review this section and either continue to add the necessary information for submission to NOV or cancel the submission.
 - III. Once an item is actioned it will be removed from this section.



Purchase Order	Part Number	Part Name	Manufacturer Model Number			
105462	17862654- 001	Stud;1.250-8 UNR-2A;L 6.125 in;Matl ASTM A320 Grade L7;PTFE (Xylan) Coated;Tap End (Unequal Threaded Length);Tap End 1.4	Buy To Description	Continue	Cancel	(i)
105462	17863014- 001	Nut;Hex;Heavy;0.875-9 UNC-2B;Matl ASTM A194 Grade 7;PTFE (Xylan) Coated;ASME B18.2.2;BSL-1;API 20E, XYLAN 1052	Buy To Description	Continue	Cancel	i
885822	17771003- 001	API 20E Screw, Proprietary;Socket Head;0.625-11 UNRC-2A;L 2 in;BSL-3;AX010291;AX040085;Fully Threaded		Continue	Cancel	(î)
892311	16513104- 001	Screw, Cap;Socket Head;ASME B18.3;1.000-8 UNC-2A;L 3 in;Fully Threaded;Matl ASTM A574 Alloy Steel;Zinc- Nickel Plated	Buy To Description	Continue	Cancel	i
906500	17875099- 001	API 20E Nut Proprietary;Heavy Hex;2.000-8 UN-28;8SL-2;AX010302;AX040085		Continue	Cancel	(i)

- b. To cancel an item, select the continue field. The form will populate previously saved information. If this is an error/not needed, select Cancel field.
- c. To finalize submission, add missing information and select Send to NOV. The item will be removed from this section.



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2.3 Parts Missing Certificates

- a. When NOV has received items that require traceability but not the required documentation, the files should be added and submitted to NOV through the Parts Missing Submission section.
 - I. There is a filter at the top of this section to refine the search.
 - II. The supplier should routinely review this section and either continue to add the necessary information for submission to NOV or cancel the submission.
 - III. Once an item is actioned it will be removed from this section.
- b. Select Add Files to open and drag/drop or upload files then select Send To NOV or Cancel.

Add	l Certificates	In Progress 5	Parts Missing Certificates 143 Rejected 3 History	
	tanisi Neur te Islavje Aslavje			

Q Enter Purc	nase Order, Par	t No., Part Name or Manufacturer Model No. to filter list			
Purchase Order	Part Number	Part Name	Manufacturer Model Numbe	r	
105462	17863029-001	Nut;Hex;Heavy;1.250-8 UN-2B;Matl ASTM A194 Grade 7;PTFE (Xylan) Coated;ASME B18.2.2;BSL-1;API 20E, XYLAN 1052	Buy To Description	Add Files	i
604621	10455599-001	Pin, Proprietary;Arm Assembley;Dia 2.25 in;L 9.13 in;Iron Roughnecks;ST-120/160;Matl MS00015 17-4PH H1150;Stamp P/N & Re	10455599-001	Add Files	i
776064	17919650-002	Stud;1.125-8 UN-2A;L 5.5 in;Matl ASTM A320 Grade L7;PTFE (Xylan) Coated;BSL-2;In Compliance to API 20 E	Buy To Description	Add Files	i
871111	18048410-001	API 20E Screw, Proprietary;12-Point;1.000-8 UNRC-2A;L 2.25 in;BSL-1;AX010307, BSL-1;AX040085;Partially Threaded		Add Files	i
897084	18004948-001	Screw, Cap;Hex Head;Heavy;ASME B18.2.1;0.750-10 UNC-2A;L 2.75 in;Fully Threaded;Matl ASTM A325 Type 1;Zinc Plated	Buy To Description	Add Files	i

2.4 Rejected

- a. When there is a number visible next to the Rejected section, there are items that have been reviewed by NOV but rejected with reason stated. **These require supplier action as soon as possible**.
 - I. There is a filter at the top of this section to refine the search.
 - II. Each item in the Rejected section will have comments explaining why the documentation was rejected.
 - III. The supplier should review/correct the documentation and resubmit as soon possible for NOV review again.
 - IV. Once the item is actioned it will be removed from this section.
 - V. Please note: When resubmitting a previously rejected document, please use the **Rejected** screen only.
- b. Select continue to open the rejected item and action accordingly.



Q. Enter Purchase Order, Part No. or Part Name to filter list

Purchase Order	Part Number	Part Name	Traceability Numbe	
rurenase order	Tars Humber		traceability trainibe	
911044	18260043-001	API 20E Nut Proprietary;Heavy Hex:1.375+8 UN-28;8SL-3;AZ010303;AX040091;TRANSOCEAN SPEC	2	Continue
105462	17862414-001	Stud;0.875-9 UNRC-2A;L 4.625 in;Mati ASTM A320 Grade L7;PTFE (Xylan) Coated;Tap End (Unequal Threaded Length);Tap End 1.	PUN52019750	Continue (j)
911044	18260043-001	API 20E Nut Proprietary;Heavy Hex;1.375-8 UN-28;8SL-3;AZ010303;AX040091;TRANSOCEAN SPEC	12345	Continue (j)



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- c. Once the rejected item has opened, the reason for rejection can be found in the green bar above Purchase Order Details.
 - I. Choose the red "Update" button to update either the traceability information and/or the certificate files.

Certificate has been Rejected! Reason for rejection: MTR is missing Hardness report is missing UT report is r	nissing					
Purchase Order Details	TRACEABILITY		Certificate Files			
Purchase Order 918688	Туре	Number	Filename	Туре	Size	
910000 Part Number 10090176-001	Serial No.	XK-21-1010935	918688 LINE 1_PN 17904088-300_XK-21-1010935.pdf	Adobe PDF	976.439 KB	Ļ
Part Name Processing, Outside;Machining						
Manufacturer Model Number	Update		Update			
HISTORY						

II. After clicking the red "Update" button, a confirmation box will pop-up. Click "confirm" to confirm you would like to update the traceability numbers or confirm you would like to update add a new document.

Update Traceabilities ×	Update Files ×
Please confirm that the Lot and Serial number references are to be updated.	Please confirm that new files are to be uploaded. By doing this all files that has previously been uploaded will be removed.
Confirm	Confirm Cancel

III. After confirming, update the field needing changes (either traceability information and/or documentation). Once the update(s) have been made, click the red "Send to NOV" button at the bottom left-hand side of the screen.

2.5 History

- a. The History sections includes items that have been previously submitted to NOV.
 - I. There is a filter at the top of this section to refine the search.
- b. Find the item to view and select the information icon, it will show the submission information.
- c. To view the file that was submitted, select the download icon.
 - I. Note: this can take several minutes to display the information.

NOY Ad		in Progress 💈 Parts	Missing Certifica	ites 143 Rejected 3 His	tory			
			Details for Up	load		×		
Q Enter Pure	base Order, Pa	rt No. or Part Na	Purchase	Order Details				
- Liner Purch		it no. of Part Na	Purchase C 901826	order			_	
Uploaded Date	Purchase Order	Part Number	Part Numb 18045257-0				raceability Number	
0001-01-01	901826	18045257-	Part Name		3 UN-28;85L-3;AZ010303;AX040091;8uild per AX050040.TO		-19	() L
0001-01-01 00:00:00	911044	18260043- 001	Requiremen	reprietary,neavy nex,5.500-6 its - 17748730-G rer Model Number	s un-26,651-3,420 10303,44040091,60iiid per 44030040.101			(j) 🛃
0001-01-01	911044	18260043- 001	Traceabilit		Files		2345	(i) 🚽
0001-01-01	105462	17862414-	Traceability				UN52019750	(i) 🛃
0001-01-01 00:00:00	902327	17971379- 001	Type Lot No.	Number 4-19	Filename PO#POlinePNLotSerialpart3.pdf		-MEX-21;2-MEX-21	(i) ↓
0001-01-01 00:00:00	902327	17971379- 001						(î) L
0001-01-01 00:00:00	885822	17771003- 001				Close	556	(i) L



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3 USER SUPPORT

- a. For troubleshooting help, please fill out and submit the <u>Cert App Registration & Troubleshooting</u> <u>Form</u>.
 - I. A system administrator will contact you to help resolve your Cert App issue once the form is received.
- b. To ask quality specific questions, please contact your NOV Quality Representative
 - I. For rejected documentation, the NOV Quality Representative will be listed on the email notification.

