EXOSTAR

SupplyLine

by Robot Morning

Quality Agent User Documentation

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NOTE: Some features described in this documentation may not be available in some systems

Navigating SupplyLine

Sidebar Menu and Status Toolbar

Upon first logging into SupplyLine, you will have access to the following:

- **Sidebar Menu** – The bar at the top of the page that contains the following menu items:
  - **Current Supplier** – The supplier you are currently viewing
  - **Parts**
  - **Search All Parts**
  - **View QRAs** – review and approve QRAs that are in **Pending Review** status
  - **Tools** – contains **ASN Approval** when shipments are enabled
- **Status Bar** – The bar at the top contains the following:
  - **Your Full Name**
  - **Last Schedule Refresh**
- **Broadcast Messages** – Important messages that the customer has posted

Parts

Part Reference Flag Filters

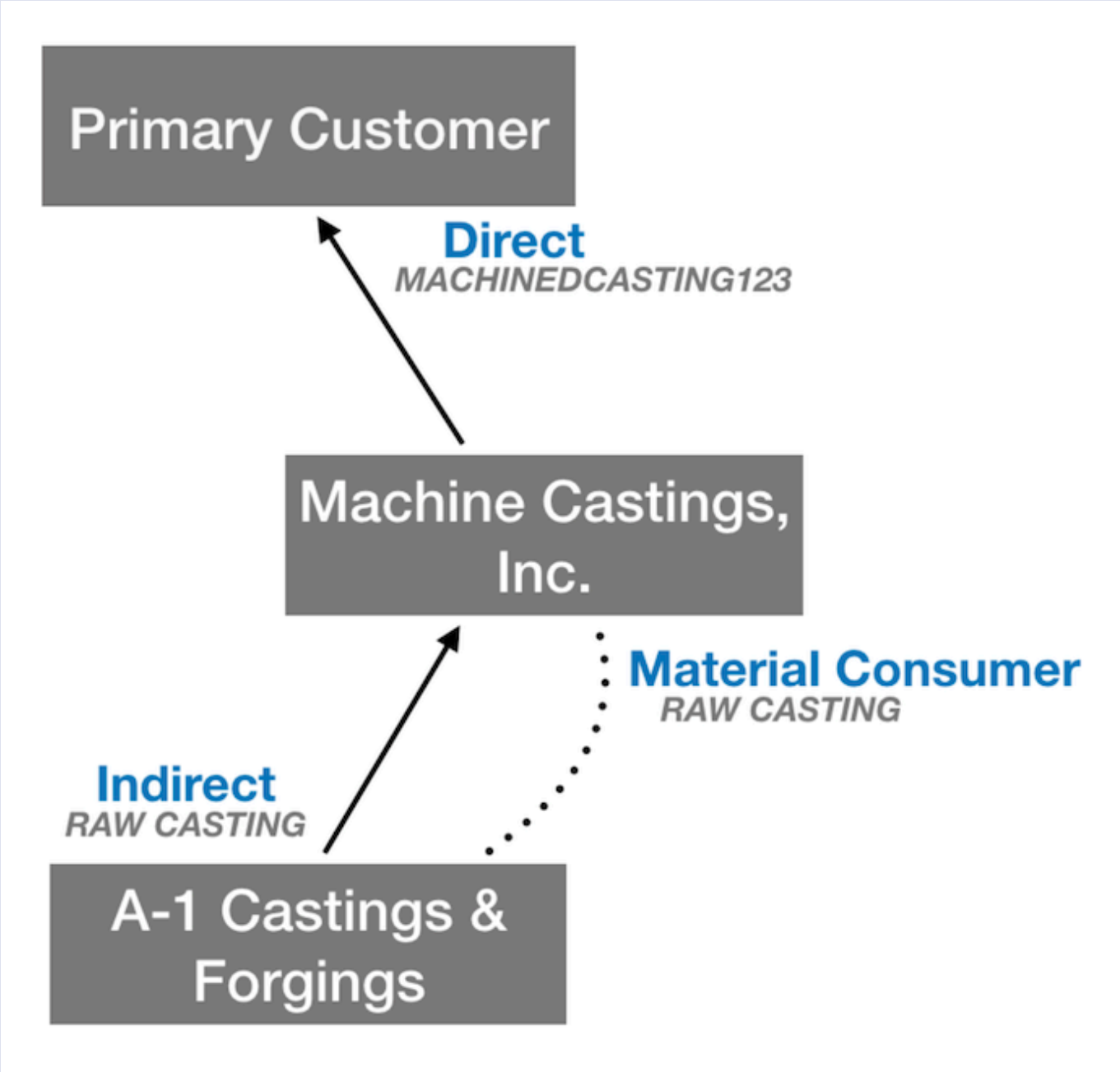
SupplyLine automatically flags items to show important statuses. The table below describes each of the part reference flags, along with how to resolve them if necessary.

Icon	Name	Meaning	Resolution
	Critical	Item has past due release; production is delayed	Supplier: ship parts
	Rescue	Item does not have past due releases, but parts are needed now	Supplier: ship parts
	Delinquent	Item has past due releases	Supplier: ship parts
	Shippable	Item has shippable releases	
	In Transit	Item has ASN(s) in transit	
	Stop	Item has no firm releases (may have forecast/planned)	
	Missing Commits	Item has releases not covered by supplier plans	Supplier: update supplier plans
	Stale Commits	Item has supplier plans that are in the past	Supplier: update supplier plans
	Kit	Item has kit component	
	Transition	Item is in transition to supplier	

Part Relationships

SupplyLine supports a few different types of supplier relationships. They are:

- Direct to Primary Customer
- Indirect to Other Customers
- Material consumer (Purchasing from Suppliers)



In the example above, the supplier Machine Castings, Inc. is a Direct supplier to the Primary Customer because they ship finished goods directly to the Primary Customer.

A-1 Castings & Forgings is an Indirect supplier to the Primary Customer because they sell materials which have been pre-negotiated by the Primary Customer to Machine Castings, Inc.

Machine Castings, Inc. is a Material Consumer because they are buying those pre-negotiated materials from A-1 Castings & Forgings.

Viewing a Part

Select **Parts** from the sidebar and scroll to the part you wish to view. You can also begin typing the item number into the search bar at the top of the part list. Click on a part number in the part list, which will open the **Part view** screen.

If your user account is linked to more than one supplier, you have the option of filtering the part list to a specific supplier by selecting a supplier in the **Current Supplier** dropdown menu.

Using the Part view

The **Part view** screen contains the most important information related to a single finished good. The information below shows a **Part view** screen and describes its different parts.

1. Supplier name and code
2. Item code
3. Item description
4. Quantities that are shippable and in transit to the customer
5. The supplier item code, if it is different from the item code used by the customer
6. List of all active ASNs (not available for Quality Agent users)
7. Button to open the Quality Release Authorization Maintenance view
8. Tab to display schedule for a **Direct to Primary Customer** part (finished good)
9. Schedule for the item
10. Export to Excel or CSV button, which appears in tables throughout SupplyLine

Viewing the schedule

The schedule for each item is displayed in the bottom half of the **Part view** screen.

Quality Release Authorization

A Quality Release Authorization (QRA) is a document certifying that the parts being supplied comply with the customer's quality requirements. QRAs are created by designated Product Release Verification (PRV) personnel.

Note: A QRA is only required if the purchasing order line is flagged by the customer's source system as requiring a QRA.

A QRA can go through up to three approval steps, depending on how the customer has configured SupplyLine:

- **PRV personnel approval:** The PRV personnel who creates the QRA approves it on save.
- **Sub-tier supplier sign-off:** When the QRA requires sub-tier supplier sign-off, the sub-tier supplier's PRV personnel must sign off before the QRA can be used.
- **Quality Agent review:** When the customer has enabled the QRA inspection workflow and the PO line requires inspection, you review the QRA and approve or reject its quantity before it can be used.

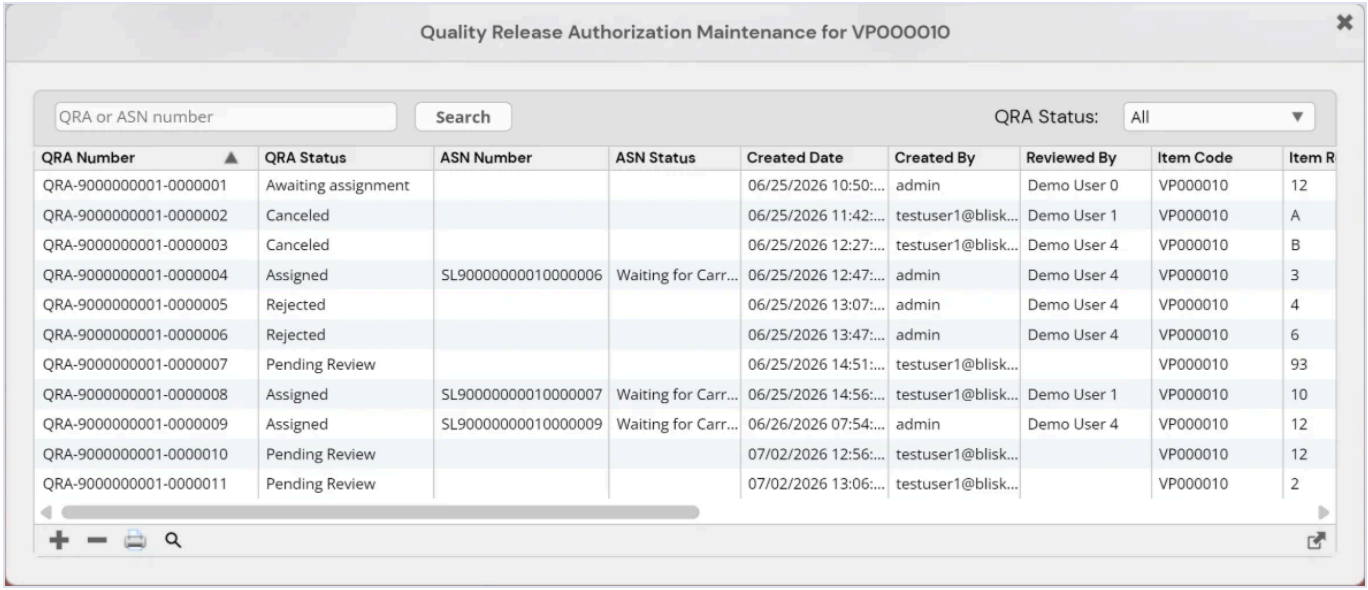
See Reviewing and Approving a Quality Release Authorization.

Quality Release Authorizations can be in one of the following statuses:

- **Assigned:** The QRA has been assigned to an ASN.
- **Awaiting Assignment:** The QRA has been created and signed off by the PRV personnel. The QRA is awaiting assignment to an ASN.
- **Canceled:** The QRA has been canceled by the PRV personnel.
- **Awaiting Sign-off:** The QRA has been created by the supplier and is awaiting sign-off by the sub-tier supplier PRV personnel.
- **Pending Review:** The QRA was created against a PO line that requires inspection and is waiting for you to approve or reject it. It cannot be used on an ASN until it is reviewed.
- **Rejected:** The full quantity of the QRA was rejected during the review.

The **Quality Release Authorization Maintenance** window can be used to create and cancel QRAs. Depending on whether the customer has enabled digital QRAs, one of the following will happen:

- **Digital QRAs Disabled:** You can use the **Quality Release Authorization Maintenance** window to reprint QRAs
- **Digital QRAs Enabled:** You can use the **Quality Release Authorization Maintenance** window to reprint QRA traveler tags



The **Quality Release Authorization Maintenance** window is accessible from the **Part view** screen. From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), click **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window.

The search field in the **Quality Release Authorization Maintenance** window allows you to filter the list of QRAs by QRA number or ASN number. The QRA Status dropdown filters the list of QRAs by status (All, Assigned, Awaiting assignment, Awaiting sign-off, Canceled, Pending Review, Rejected).

As a Quality Agent, you can also open the **QRA View** screen from the menu to review QRAs across all parts and suppliers in a single list, rather than one part at a time. Access to this screen is independent of

whether your customer uses the inspection workflow: customers who do not use QRA approval simply do not assign anyone to the Quality Agent role, while administrators always retain access (with nothing to approve when the workflow is not in use).

Viewing QRAs Across Parts and Suppliers

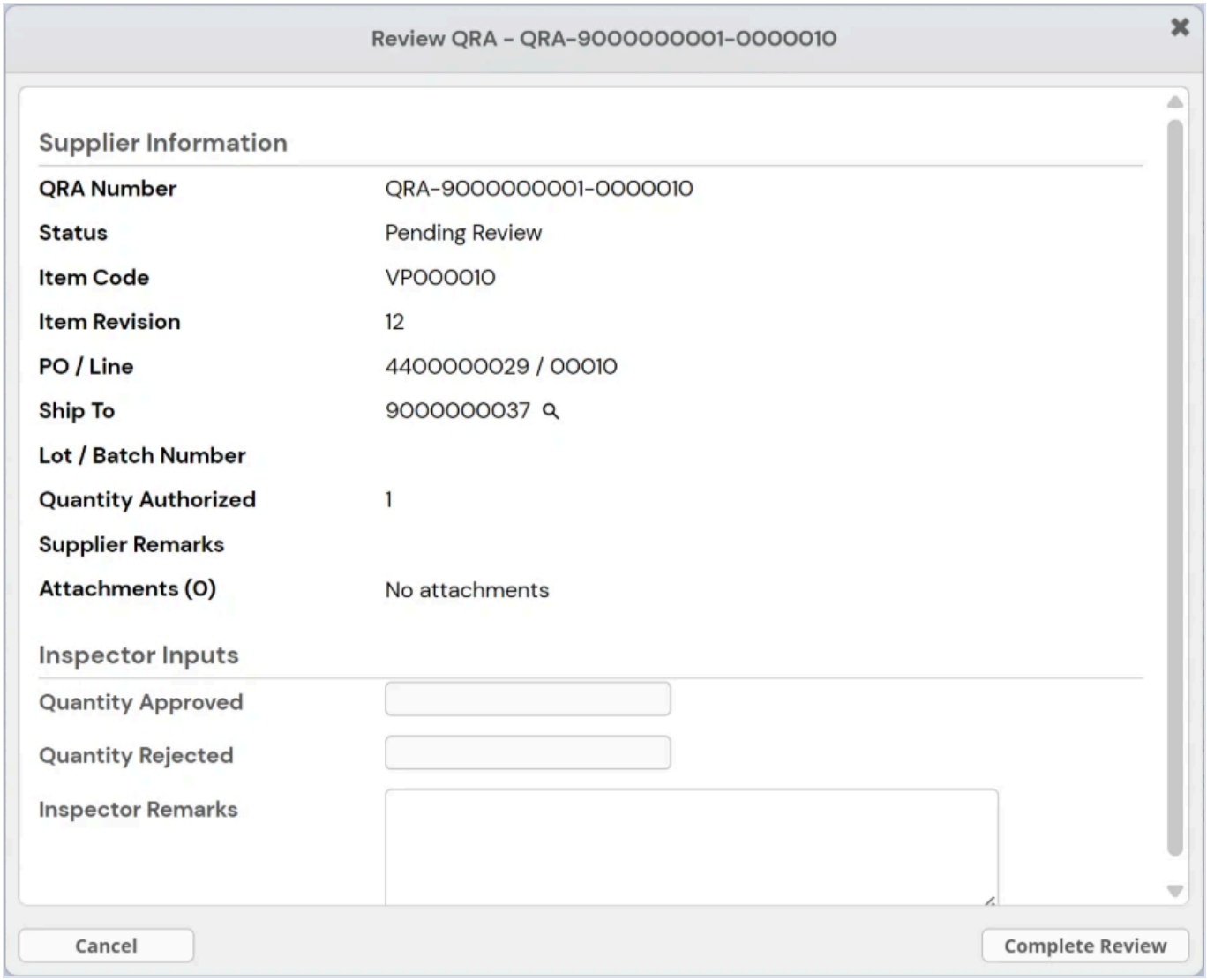
Select **View QRAs** from the main navigation bar to open the **Quality Release Authorizations** window. Unlike the **Quality Release Authorization Maintenance** window — which shows one part at a time — this list spans every part and supplier in a single view.

- The list shows QRAs in all statuses across all suppliers and parts.
- QRAs in the **Pending Review** status are listed first so that review work is easy to find. Each Pending Review row shows an **Action** affordance for opening the QRA for review.
- The list shows the same columns as the **Quality Release Authorization Maintenance** window, plus **Approved Qty** and **Rejected Qty** columns that are populated when a QRA is reviewed. The **Reviewed By** column shows who reviewed each QRA.
- The list is capped at 50 rows (no paging), prioritizing Pending Review and the oldest pending QRAs.
- Use the search field to filter by QRA number or ASN number, and the **QRA Status** dropdown to filter by status.

Reviewing and Approving a Quality Release Authorization

When a QRA is in the **Pending Review** status, open it from the **Action** affordance in the QRA list, or select it and click 📋 **Review QRA** on the QRA table toolbar, to review it before recording a disposition. **Review QRA** is available only to Quality Agents and only for QRAs in **Pending Review** status. The review view shows the detail the supplier entered when the QRA was created, read-only, so you have full context:

- The QRA's item and order detail (item code, revision, PO / line, lot / batch number, and quantity authorized).
- **Ship To** — the ship-to address for the PO line.
- The supplier's responses to any attestable statements.
- **Supplier Remarks** — any free-text remarks the supplier entered.
- **Attachments** — any supporting files the supplier uploaded with the QRA (for example a certificate of conformance, inspection sheet, or photos). Each file is listed by name; click a file name to open or download it. When the supplier uploaded no files, the section shows **No attachments**.



To disposition the QRA, enter the **Quantity Approved** and **Quantity Rejected**, add any **Inspector Remarks**, and complete the review. The approved and rejected quantities together cannot exceed the quantity authorized.

When the review is complete, the supplier's users and the customer are notified by email. The QRA status becomes **Rejected** when the full quantity was rejected; otherwise it moves to **Awaiting assignment** and can be used on an ASN. A partly rejected QRA can ship its remaining quantity (the quantity authorized minus the quantity rejected). A reviewed QRA cannot be edited, so the supplier creates a new QRA to ship the rejected quantity.

The supplier's attachment file names and count are also listed on the **QRA PDF** for the record; the files themselves are opened from this screen.

Creating a Quality Release Authorization

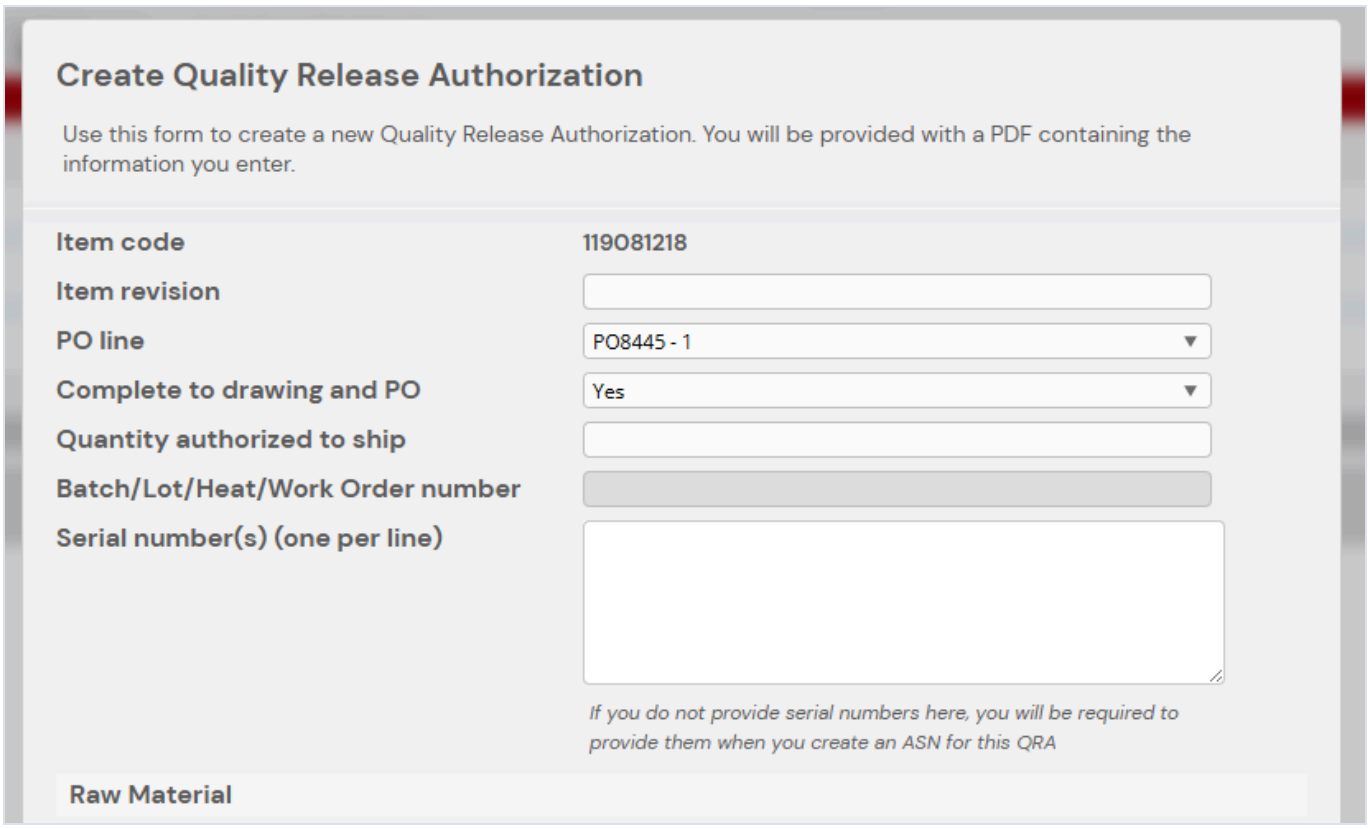
Only a PRV personnel can create a QRA if User Entitlements are enabled by your customer.

To create a QRA, access the **Quality Release Authorization Maintenance** window from the **Part view** screen. The QRA is automatically approved by the PRV personnel that created it (or, when sub-tier sign-

off is required, once the sub-tier supplier signs off), unless the customer has enabled the QRA inspection workflow and the PO line requires inspection. In that case the QRA is created in **Pending Review** status and must be reviewed by a Quality Agent before it can be used on an ASN. See Reviewing and Approving a Quality Release Authorization.

From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), the PRV personnel clicks **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window. If this button is disabled, no purchasing order lines for this part require a QRA.

Once the **Quality Release Authorization Maintenance** window is open, the PRV personnel can click ➕ **Add** to open the view used to create a new QRA. Select the PO Line that the QRA applies to.

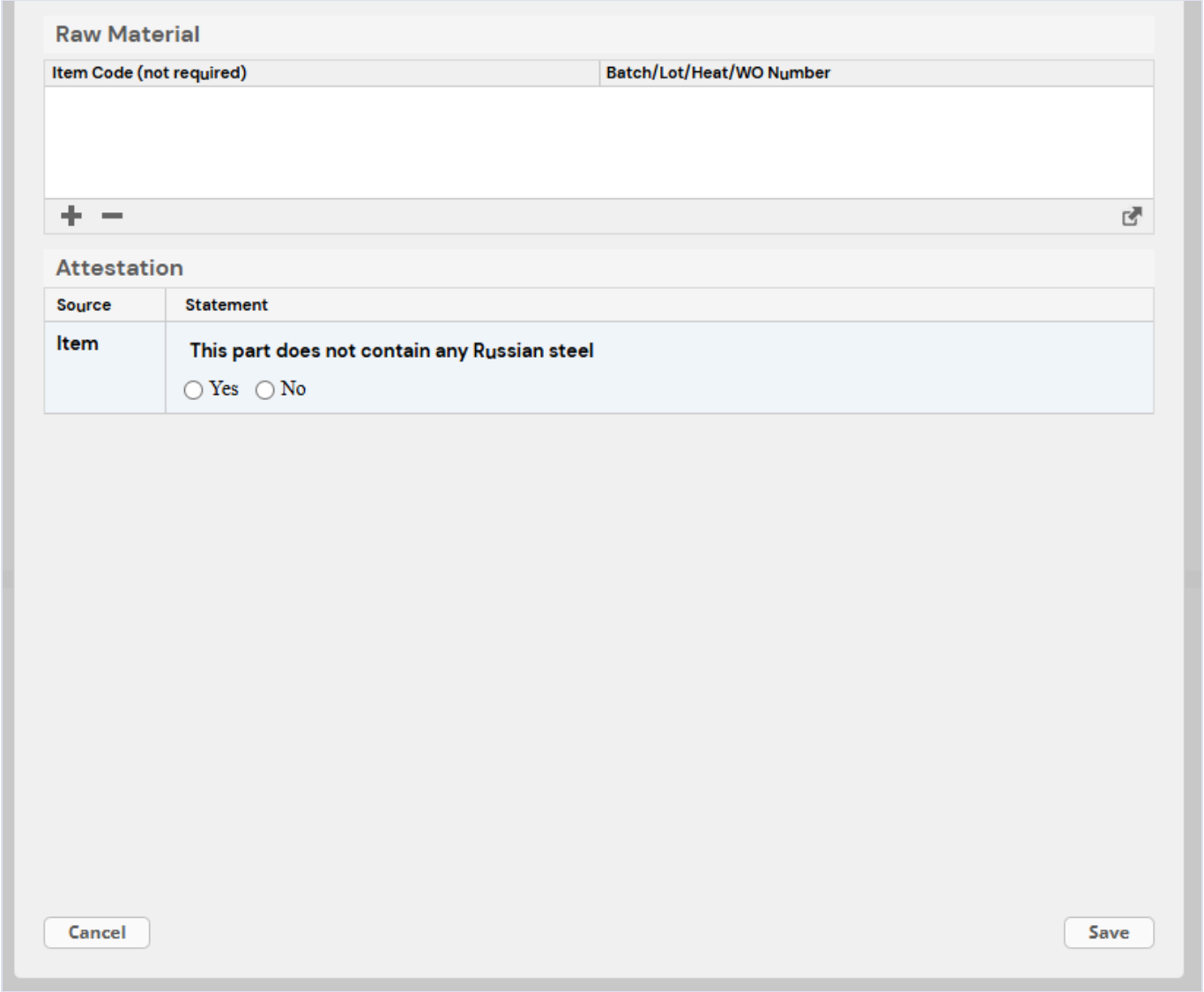


In the case where a sub-tier supplier is required to sign off on the QRA, do the following:

1. Check the **Requires sub-tier supplier sign-off** checkbox
2. Provide the sub-tier supplier code in the **Sub-tier supplier code** field

If the part requires raw material traceability identifiers, the PRV personnel may enter them in the **Raw Material** table. The raw material **Item Code** may be required for each identifier, depending on configuration.

If the part has attestable statements registered in SupplyLine, the PRV personnel must read and attest to the statements in the **Attestation** table.



After filling in the remaining data required for the QRA, click **Save**. If your customer has turned off automatic QRA printing on save, no document is produced at this point; the QRA is still created and can be printed later from the Quality Release Authorization Maintenance window. Depending on whether your customer has enabled digital QRAs, one of the following will happen:

- **Digital QRAs Disabled:** This will generate a QRA document. You should include the QRA document with the physical goods that you are shipping.
- **Digital QRAs Enabled:** This will generate a QRA traveler tag that you can use to identify the parts that you are shipping. You should not include the QRA traveler tag with the physical goods that you are shipping.

Note: The quantity entered in **Quantity authorized to ship** must match the quantity that will be shipped on the ASN.

If SupplyLine is configured to register or validate traceability identifiers (serial numbers or lot numbers), a request will be made to the configured quality management system to register or validate them before the QRA is created.

Canceling a Quality Release Authorization

Only a PRV personnel can cancel a QRA. To cancel a QRA, access the **Quality Release Authorization Maintenance** window from the **Part view** screen.

From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), click 📋 **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window. If this button is disabled, no purchasing order lines for this part require a QRA.

Once the **Quality Release Authorization Maintenance** window is open, select the QRA that you would like to cancel and click ➖ **Delete**. A confirmation dialog will require you to confirm that you want to cancel the QRA. To cancel the QRA, click **Yes**.

Reprinting a Quality Release Authorization

Depending on whether your customer has enabled digital QRAs, one of the following will happen:

- **Digital QRAs Disabled:** This will allow you to reprint a QRA document. You should include the QRA document with the physical goods that you are shipping.
- **Digital QRAs Enabled:** This will allow you to reprint a QRA traveler tag that you can use to identify the parts that you are shipping. You should not include the QRA traveler tag with the physical goods that you are shipping.

From the **Advanced Shipment Notifications (ASNs)** section (labeled **Shipments** when the Shipments feature is enabled), click 📋 **QRA Maintenance** to open the **Quality Release Authorization Maintenance** window. If this button is disabled, no purchasing order lines for this part require a QRA.

Once the **Quality Release Authorization Maintenance** window is open, select the QRA that you would like to reprint and click 🖨️ **Print QRA** to reprint the QRA.

Signing-off on a Quality Release Authorization

Sub-tier QRA sign-off is performed by the sub-tier supplier's PRV personnel. It is not available to Quality Agent users. QRAs waiting for sign-off show the **Awaiting Sign-off** status.

ASN Approval

Quality Agent users can approve ASNs from **Tools > ASN Approval** when shipments are enabled for the customer. Quality Agent users cannot create ASNs or shipments.

SupplyLine Extras

Finding Items on a Page

In many areas of the SupplyLine application, it can be helpful to utilize the key combination CTRL + F (CMD + F for Mac users) to search for values in the user interface. This key combination can speed up the process of locating information like a QRA number or part number in a long list.

Exporting Data from Tables

There are several places in SupplyLine that allow you to export a list of data to a Microsoft Excel or Comma-Separated Value (CSV) file. If a table is available to be exported, **Export** appears at the bottom of the table.

For example, from the **Quality Release Authorization Maintenance** screen, the **Quality Release Authorization** table can be exported to Excel or to a CSV file. **Export** appears at the bottom-right corner of each table.

Help

Training Videos

Several SupplyLine training videos are available for you to view. These can be helpful when learning to navigate SupplyLine. To access the training videos:

1. Click
   
   on the bottom of the sidebar menu.
2. Select **Training Videos**
3. Select a video to view from the list provided

Opening a Support Ticket

To contact Robot Morning's Support Team, all users can open a new Support Ticket. To open a new Support Ticket, follow these steps:

1. Click
   
   on the bottom of the sidebar menu.
2. Select **Contact Support** from the menu
3. Follow the instructions in the support message to submit a support ticket

Superusers can modify the text, email address and portal URL. Please refer to RMOS User Documentation for details.