



# eSCR Job Aid for Suppliers

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## Technical Help

If you are unable to access the Supplier Portal or experience technical difficulties, please email the eSCR Engineer at [eSCRAdmin@pge.com](mailto:eSCRAdmin@pge.com) with the following information:

- Description of the problem
- Error code or error message received (if applicable)
- Screenshot(s)

The eSCR Engineer will work with our technical support team to resolve the problem as quickly as possible.

## Benefits of the Electronic Supplier Change Request (eSCR) Process

Some of the benefits from the implementation of the eSCR process are:

- Makes it easier for suppliers to launch the SCR process – compliance has never been easier
- Eliminates confusion
- Shortens the cycle time from submission to approval
- Prevents unapproved changes that can result in delays and returns at best, and defects and non-conformances that lead to scrap, rework, failures, and accidents at worst
- Can positively impact Supplier Scorecards, PG&E's tool for making purchasing allocations

## Glossary of Terms

Term	Definition
ECC	Enterprise Core Component, SAP system of record. SAP system of record.
eSCR	Electronic Supplier Change Request
eSCR Engineer	The Supplier Quality Engineer is a new role created to administer the eSCR process. The eSCR Engineer will be the primary point of contact regarding Supplier Change Requests, and QZ Notifications.
Manufacturer	Supplier that manufactures or produces materials and supplies to PG&E either directly or through a distributor.
MPR	Notification Type: QM. Material Problem Report.
Portal	Supplier Portal: External portal where Suppliers submit change requests. eSCR SAP Portal: Internal portal for PG&E users to process QZ Notifications.
Purge	Notification Type: QP. The process of isolating and removing non-conforming material from Distribution Centers (DC), Remote Locations (RML), and/or the Field, which are suspected of being “not in compliance” with purchase order or engineering requirements.
QZ Notification	SAP notification type for eSCRs.
Recall	A product recall is a request to return a product after the discovery of safety issues or product defects that might endanger the consumer or put the maker/seller at risk of legal action.
SAP ECC	PG&E SAP ECC (ERP Central Component) standard system of record.
SAP HANA Cloud Supplier Portal	A Cloud based portal, built to allow Suppliers to complete electronic Supplier Change Requests and submit them to PG&E. The portal reflects status changes as notifications are processed by PG&E’s eSCR Engineer, and other eSCR stakeholders.
SCR	Supplier Change Request
SQE	Supplier Quality Engineer
Supplier	Partner that purchases or distributes materials to PG&E by procuring from Manufacturers.
Supplier Request ID	Unique identifier that is assigned to the Supplier’s request upon initial Save or Submit in the Supplier Portal.

## Change Types

The following list includes the 19 identified Supplier Change Request Types.

Item	Change Type	Change	Details
1.	Plant Site Location	Production from tooling and equipment transferred to a different plant site or from an additional plant site	Production process tooling and/or equipment transferred across the united states, internationally or closing of a plant
2.	New or Modified Tools	Production from new or modified tools (except perishable tools), dies, molds, patterns, etc. including additional or replacement tooling	This requirement only applies to tools, which due to their unique form or functions can be expected to influence the integrity of the final product. It is not meant to describe standard tools (new or repaired), such as standard measuring devices, drivers (manual or power), etc.

Item	Change Type	Change	Details
3.	Production / Tooling Upgrade	Production following upgrade or rearrangement of existing tools or equipment	<p>Upgrade means the reconstruction and/or modification of a tool or machine or to increase the capacity, performance, or change its existing function. This is not meant to be confused with normal maintenance repair or replacements of parts etc., for which no change in performance is to be expected and post repair verification methods have been established.</p> <p>Rearrangement is defined as activity that changes the sequence of product/process flow that documented in the process flow diagram (including the addition of a new process). Minor adjustments of production equipment may be required to meet safety requirements such as, instillation of predictive covers, elimination of potential ESD risks, etc.</p>
4.	Test Method / New Process	Change in factory test/inspection method - new technique (no effect on acceptance criteria), Process technology new to the organization not previously used for this product.	For change in test method, the supplier should have evidence that the new test method is comparable or better than previous versions

Item	Change Type	Change	Details
5.	Manufacturing Process / Components	Product and process change related to components of the production product manufactured internally or manufactured by suppliers	Any changes, including changes at the suppliers to components of the finished product
6.	Inactive Tooling	Product produced after the tooling has been inactive for volume production for twelve months or more	For product that has been produced after tooling has been inactive for twelve months or more: Notification is required when the part has had no change in active purchase order and the existing tooling has been inactive for volume production for twelve months or more. The only exception is when the part has low volume, e.g., service or specialty material/equipment that regularly goes dormant and will not impact form, fit or function upon resuming production
7.	New Part Number	A supplier new / revised part number for an existing part from the supplier	Submission is required for a revised or previously approved product that has a new or revised product/part number (e.g. suffix) assigned to it. An example would be a supplier moving to SAP which requires a new set of part numbers. In this example nothing changes regarding the part itself or to the part numbers used internally at PG&E



Item	Change Type	Change	Details
8.	Product Correction or Waiver	"Possible request to Waive, or accept a non-conformant part. Correction of a discrepancy on a previously submitted part or deviation on Spec. (Waiver) "	<p>A request for Waiver is a request from Supplier to PG&amp;E to accept a non-conformant part. This will be approved or rejected by PGE Engineering.</p> <p>Submission is required to correct any discrepancies on a previously submitted part A " discrepancy" can be related to:</p> <ul style="list-style-type: none"> <li>- Change in Application / Maintenance</li> <li>- The product performance against customer requirements</li> <li>- Dimensional or capability issues</li> <li>- Supplier Issues</li> <li>- Approval of a part replacing interim approval</li> <li>- Testing, including material, performance, or engineering validation issues</li> </ul>
9.	Product Attributes	Change in product attributes / appearance	Physical changes resulting in any modification to appearance / attributes of the product are required for submittal.
10.	Software / Hardware	Software / Hardware attributes	Changes in the software, hardware or firmware
11.	Engineering	Administrative Change to design records, specifications, industry standards, regulatory compliance. Not to affect product attributes.	Submission is required on any engineering change to the product/part design record, specifications or materials. This is more of an administrative change than change to the finished product

Item	Change Type	Change	Details
12.	Raw Material	New Source of raw materials from new or existing suppliers	These changes would normally be expected to have an effect on the performance of the product
13.	Component / Material	Use of other construction method or material than was used in the previously approved part or product. Change of material (Aluminum to Steel) for production of part.	For example, other construction as documented on a deviation (permit) or included as a note on the design record and not covered by engineering.
14.	Sub-Supplier	Change of supplier for parts or process	The organization is responsible for approval of supplier provided materials and services. Also included are plant locations, manufacturing processes and design of sub-supplier products
15.	Recall	Material Recall	A supplier has issued a notification to customers that a recall of their product / equipment / material is defective or non-conformant and needs to be returned to supplier for repair, refurbishment, or replacement
16.	Product Discontinuation	Product Discontinuation for any reason	A proposed or underway permanent Product Discontinuation for any reason

Item	Change Type	Change	Details
17.	Maintenance / Inspection	Extraordinary Conditions such as a natural disaster, earthquake, workforce stoppage/change/shutdown or conditions that alter business as normal	Extraordinary conditions cover changes that may be realized by a supplier that are not covered elsewhere and dramatically effect business to an extent that PG&E is impacted and should be aware. Many of these such changes may result in upstream and downstream implications that PG&E is best suited to evaluate
18.	Packaging/Shipping/Labeling	A change of maintenance related procedures/materials initiated by supplier or additional inspection requirements driven by supplier	These maintenance/inspections notifications are usually based on field failures or enhanced risk identified by the supplier from customer feedback. Maintenance includes changes to items such as maintenance schedule, chemical, tools, brand, grade, software (ex: SCADA), etc. Anything significant that may change the performance of the part.
19.	Extraordinary Conditions / Other	If change does not fit into a defined category, place into this change type initially.	

## Red, Amber, Green (RAG) Defined

Use the following chart to assess the risk level of the subject material change, or recall.

RAG Levels	Descriptor(s)
Red	High likelihood of a significant negative event (related to change) to occur.
	Any material recalls.
	Substantial property losses; causes PG&E to delay or halt operations.
	Any threat to life. Substantial impact to health, safety and/or environment.
Amber	High potential for negative financial, regulatory, operational or safety impact.
	Possible likelihood of any negative event (related to change) to occur.
	Significant impact to administrative, qualifications or re-training tasks.
	Potential for PG&E property losses and/or operational delays.
Green	Potential for negative financial, regulatory, operational safety impact.
	Minimal likelihood of any negative event (related to change) to occur.
	Minimal to no administrative impact; quickly and easily correctable.
	No safety impact.
	No negative financial, regulatory or operational impacts.

The RAG levels can also be found in the Supplier Portal by clicking the question mark button at the top of the dashboard. Scroll to the bottom of the list to see the risk assessment levels defined.

## Questions by Change Type eSCR Form

The eSCR Change Request Form is dynamic; it changes according to what is entered. Depending on what Change Type is entered; the form will prompt you to answer a different set of questions. The following section shows a list of questions for each identified Change Type

### Standard Questions

The following questions apply to all change types.

1. Does the proposed change affect appearance, fit, form, function, performance or durability of part?
2. Does this change impact safety?
3. Is this change related to a product non-conformance or quality issue? Explain the issue and include your internal Corrective Action number.
4. Safety Risk Rating
5. Has any risk assessment been conducted? Please explain and list relevant documents being attached.
6. Will this product require new inspection or testing? Please list relevant documents being attached.
7. Will this product require new PG&E Skills and Training? Please explain.
8. Will the proposed change cause the part to violate the existing specification?
9. Is there an approved drawing, specification or instruction that requires technical modification?  
If so, please attach appropriate documentation.
10. Does this change require updates to any Manufacturing Process, Process Flow, Control Plan (or ITP), or PFMEA?
11. Change Risk Rating
12. Has appropriate testing been identified and completed with respect to fit, form or function?  
If so, please attach appropriate documentation.
13. Will the proposed change impact the process capability of significant or critical characteristics?
14. Is there a change to the labeling or barcoding process, packaging or packaging materials being used?
15. Has a timing/safety stock plan for the change been completed?
16. Will Capacity/Production Throughput be affected by the proposed change?
17. Will the change affect part flow to PG&E sites? Please explain the plan to build a safety stock to support PG&E requirements.
18. Will you be passing on any costs, such as tooling, associated with this change? DELETED
19. Is there an on-going cost increase or decrease? Please explain and quantify.

20. Will there will be any one time costs that you will be charging PG&E - (safety stock, Obsolescence, etc.)? Please explain.
21. Will the piece price be affected by this change? If so, please list price change.
22. What is the annual PG&E part volume(s)?
23. Have you reviewed safety stock requirements with PG&E Materials Planning & Handling to ensure that there will be no supply interruptions? Please list safety stock requirements and PG&E contact information
24. Have all the affected parts undergone a PPQP process and approved at the current manufacturing site?
25. If PPQP is relevant, what was the approval date?
26. What are the consequences if this change is not made?
27. Other comments to PG&E not covered above (Example: Milestone schedules)
28. Supplier / Distributor Name
29. PG&E Vendor Number (if applicable)
30. Supplier / Mfg. Contact Name
31. Supplier/Mfg. Contact E-mail
32. Manufacturer Name
33. Primary PG&E Contact Name
34. Supplier / Mfg. Contact Phone #
35. Gas or Electric
36. Primary Change Type
37. Secondary Change Type
38. Change Short Description / Reason
39. Summary on the change details and why is it being implemented?
40. PG&E Material code(s) affected
41. Supplier part number(s)
42. Manufacturer part number(s)
43. Material(s) description
44. Plant(s) affected for material(s)
45. Notification Date to PG&E
46. Estimated Supplier Change Date
47. Estimated Purchasing/Ordering Start Date
48. Estimated Earliest Delivery Date to PG&E
49. Has the change been reviewed, approved and signed off by the appropriate individuals? E.g. ENG, Operations, etc. If so, please attach appropriate documentation.

## Plant Site Location

1. Is tooling and/or equipment being transferred to a different plant location?
2. Does the new site location currently produce and ship parts for PG&E?
3. Will the ship point for the parts change?
4. Will the freight cost change? Please explain
5. If parts will be moving from one manufacturing location to another, please provide PG&E the site name and location:
6. Have you contacted your distributor and investigated any special requirements that may need to be met? (If you are moving parts to a different manufacturing location and you direct ship to PG&E through approved PG&E Distributor)
7. If a part(s) is moving to a new manufacturing location, is the ownership of this new location the same as the previous one? If not, whom are you proposing to be the third party contractor?
8. Is any tool(s) or equipment being transferred? If so, where is it being transferred?
9. What is the criticality rating of the tools?
10. Supplier provided calibration records if applicable.
11. What is the timing, moved or still moving of the transfer? Give date if possible. Add plan to long test.
12. Will the storage environment of materials change? (For example if the plant is moving from the desert in Arizona to outside near a marine environment along a coast)
13. Are there any emissions from nearby facilities that can impact the material in production or storage? Please explain (For example plant will be located next to a chemical plant which emits SO<sub>2</sub> or other corrosive / reactive gasses)
14. Why is the plant moving? (What is the "driver"?)

## New or Modified Tools

1. What parts will be produced from a new or modified tool?
2. Explain if there is any risk that it may cause damage to the product or add any cosmetic handling marks?

## Production / Tooling Upgrade

1. Will the change cause the tool to look different? If so, in what way?
2. Will the tool operate the same? If not, what is different?
3. Will the change increase quality of the tool (material, consistency, spec, etc.)? If so, please provide supporting evidence.
4. Will it affect the ability to perform any previous maintenance or calibration activities or adversely affect them in any way? Please explain.
5. Will the new technology adversely affect the product in any way? If so, please explain.

6. Will this change affect equipment calibration values or frequencies? If so, please elaborate.

### **Test Method / New Process**

1. Does this require a change in the existing documented process flow diagram including adding a new process? Provide detail.
2. Does this change involve new or modified test/inspection method that does not provide results equivalent to the previous method? If so, please explain.
3. Are there any Regulatory Compliance / Guidelines concerns? If so, please explain.
4. This change must meet specification. Please submit materials for Engineer's approval for the test plan.



## Accessing the Supplier Portal

The PG&E Supplier Portal is located at:

<https://scm-prod-7gq0p0v5.launchpad.cfapps.us20.hana.ondemand.com/bc3fb0f2-523a-40c6-9f09-83d2664dbf35.com-pgevendorregistration.compgevendorregistration-0.0.1>

You may access this page from any device, using the Chrome browser.



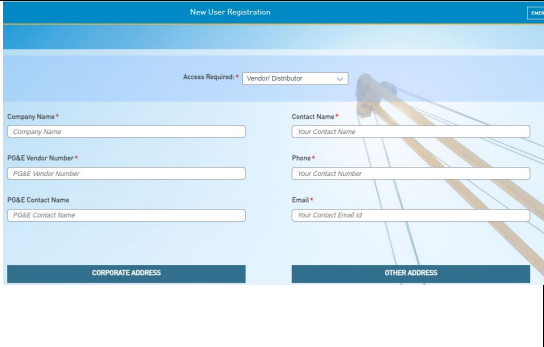

You may also access the Supplier Portal from Suppliers page at pge.com.

The screenshot shows the PG&E website's top navigation bar with links for RESIDENTIAL, BUSINESS, EMERGENCIES, SAFETY, CONTACT PG&E, and ENGLISH. Below the navigation bar is a blue banner with the text "Electronic Supplier Change Request (eSCR)". The main content area features the heading "PG&E launches online tool for submitting Supplier Change Requests: eSCR" and a paragraph explaining the launch on Oct. 24, 2016. Below this is a section titled "Here are links to more information and a link to the eSCR portal." which contains a list of links: "Introducing eSCR (PDF, 144 KB)", "Change Assessment Questionnaire (DOCX, 71 KB)", "FAQs (PDF, 154 KB)", and "eSCR Supplier Portal". The "eSCR Supplier Portal" link is highlighted with a red box.

### Supplier Registration

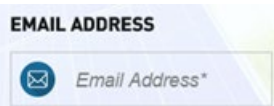
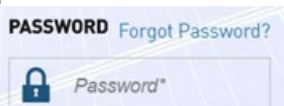

Each individual user is required to have their confidential Log In and Password.

The first time you access the Supplier Portal you need to register, using your email address. Follow these steps to register as a user of the Supplier Portal.

Step Number	Action	Results
1.	Navigate to the Supplier Portal located at: <a href="#">LINK</a> Or https://scm- prod-7gq0p0v5.launchpad.cfapps.us20.hana.ondemand.com/ bc3fb0f2-523a-40c6-9f09-83d2664dbf35.com-pgevendorregistration.compgevendorregistration-0.0.1	The login page is displayed. 
2.	Click the REGISTER button.	The SUPPLIER/DISTRIBUTOR DETAILS page opens. 
3.	Complete the form. Fields marked with an asterisk (*) are required. Please enter as much information as possible.	
4.	Click the Register button located at the bottom of the screen.	

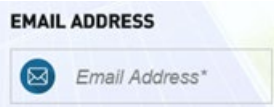
## Sign In

After completing the one-time user registration, follow these steps to log in to the Supplier Portal.

Step Number	Action	Results
1.	In the Email Address field, enter the email address used during registration. 	
2.	In the Password field, enter the password entered during registration. 	
3.	Click the Sign In button. 	You are successfully logged in.

## Forgot Password

When you forget your password, follow these steps to reset your password.


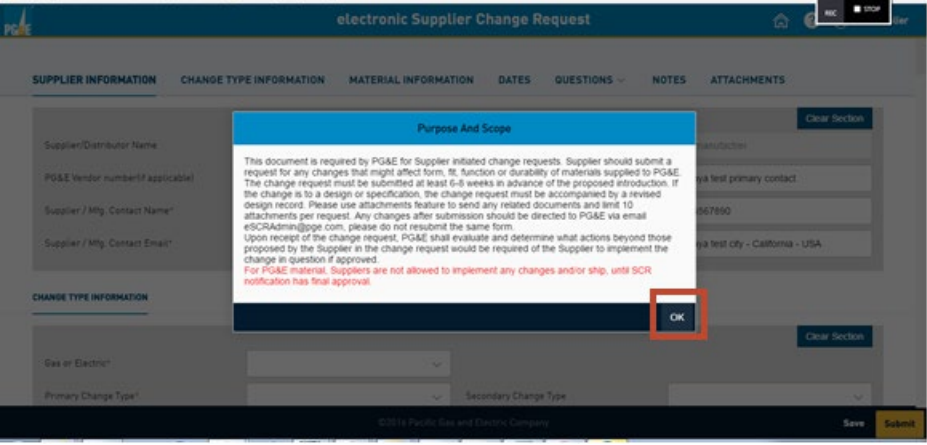
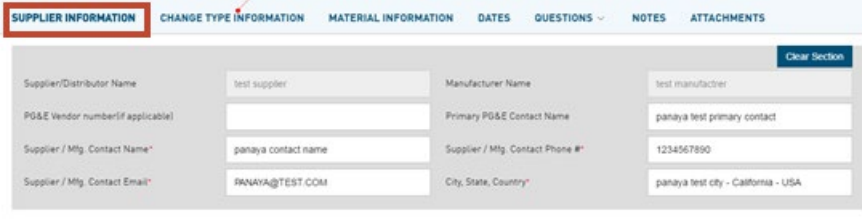
Step Number	Action	Results
1.	In the Email Address field, enter the email address used during registration. 	
2.	Click the Forgot Password? Link above the Password field.	An email is sent to the email address used during registration, with the password.
3.	Log in using email address, and the password provided on the email.	

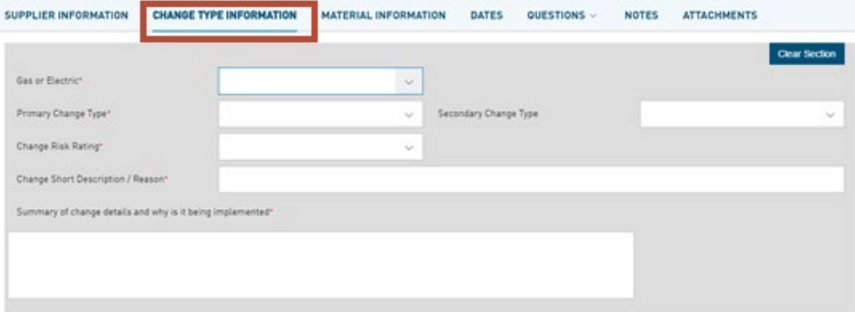
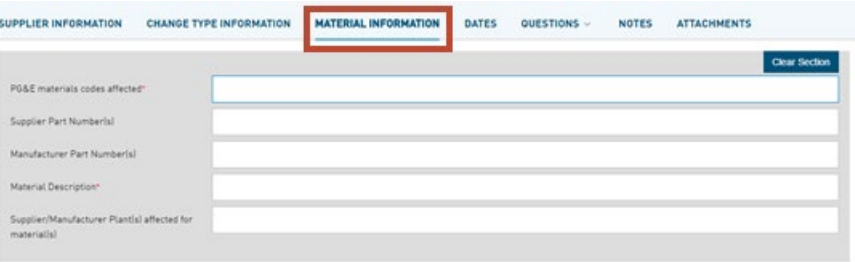
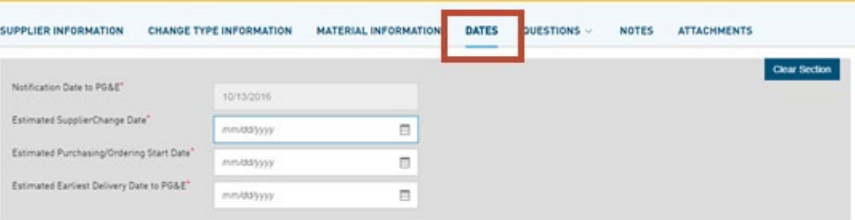
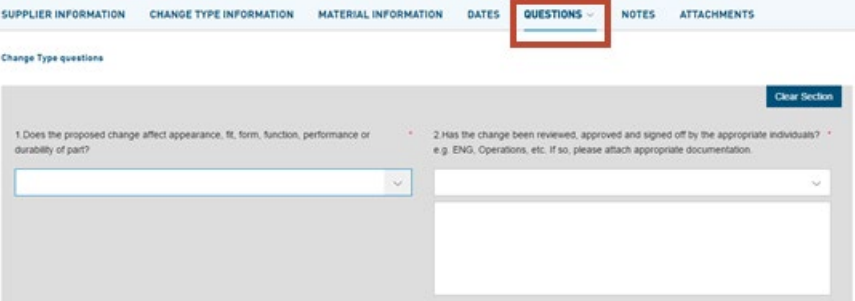
## Submit an Electronic Supplier Change Request (eSCR) to PG&E


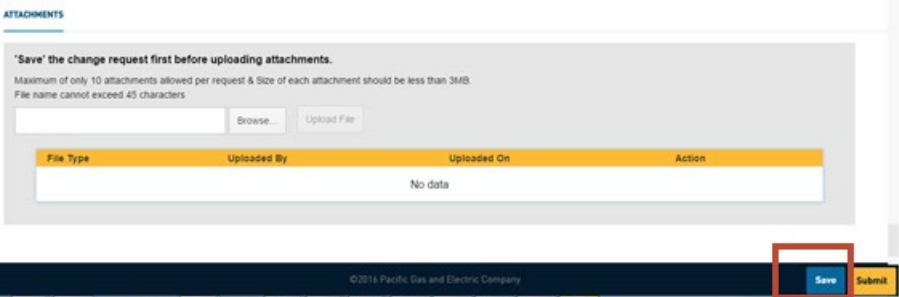
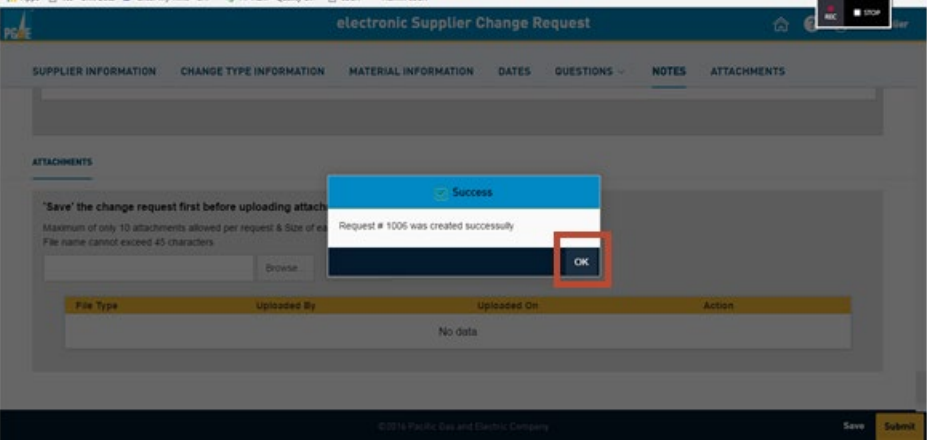
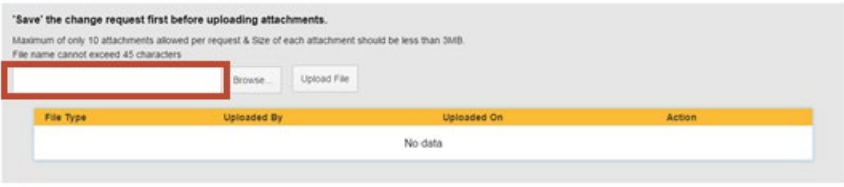
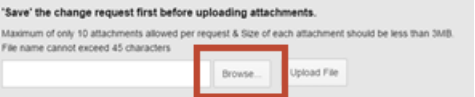
After logging in, follow these steps to complete and submit an eSCR to PG&E.

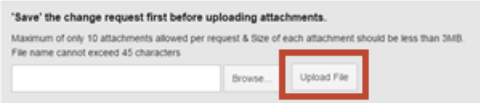
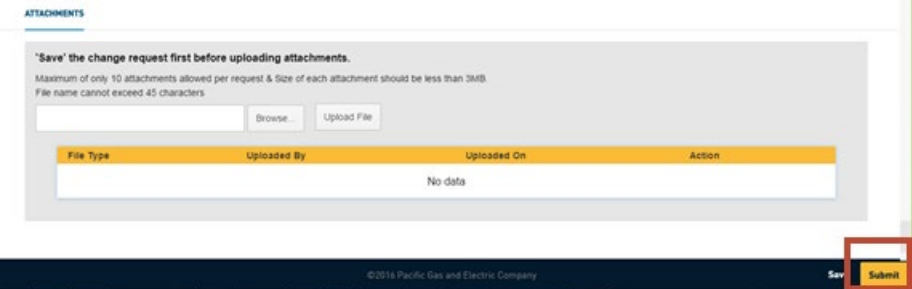
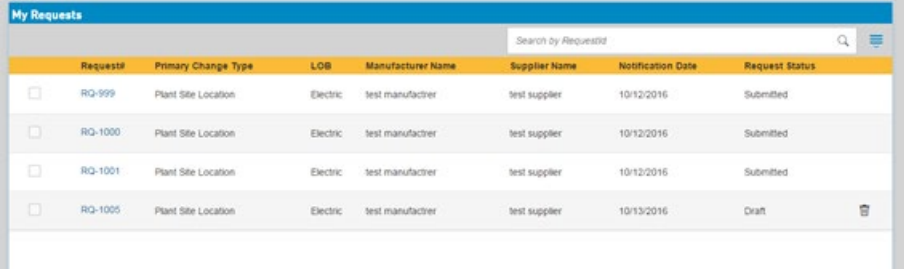
**IMPORTANT:** Pasting information into the electronic request form will create system issues, which may result in delayed processing of your request. Please **do not copy and paste** information into the Supplier Portal forms.

### Completing the eSCR and Adding Attachments

Step Number	Action	Results
1.	From the dashboard, click the Create Request button.	 <p>The screenshot shows the 'electronic Supplier Change Request' dashboard. At the top, there is a search bar and a 'Create Request' button highlighted with a red box. Below the search bar is a table with columns: Request#, Primary Change Type, LOB, Manufacturer Name, Supplier Name, Notification Date, and Request Status. The table contains four rows of data. At the bottom right, there are 'Get Status' and 'Create Request' buttons, with the latter highlighted by a red box.</p>
2.	The Purpose and Scope message is shown. Review the message and click the OK button to continue.	 <p>The screenshot shows a 'Purpose And Scope' message dialog box overlaid on the form. The message text reads: 'This document is required by PG&amp;E for Supplier initiated change requests. Supplier should submit a request for any changes that might affect form, fit, function or durability of materials supplied to PG&amp;E. The change request must be submitted at least 6-8 weeks in advance of the proposed introduction. If the change is to a design or specification, the change request must be accompanied by a revised design record. Please use attachments feature to send any related documents and limit 10 attachments per request. Any changes after submission should be directed to PG&amp;E via email eSCRAdmin@pge.com, please do not resubmit the same form. Upon receipt of the change request, PG&amp;E shall evaluate and determine what actions beyond those proposed by the Supplier in the change request would be required of the Supplier to implement the change in question if approved. For PG&amp;E material, Suppliers are not allowed to implement any changes and/or ship, until SCR notification has final approval.' An 'OK' button is highlighted with a red box.</p>
3.	Complete the Supplier Information section.	 <p>The screenshot shows the 'Supplier Information' section of the form. The 'Supplier Information' tab is highlighted with a red box. The form fields are filled with test data: Supplier/Distributor Name (test supplier), PG&amp;E Vendor number (blank), Supplier / Mfg. Contact Name (panaya contact name), Supplier / Mfg. Contact Email (PANAYA@TEST.COM), Manufacturer Name (test manufacturer), Primary PG&amp;E Contact Name (panaya test primary contact), Supplier / Mfg. Contact Phone # (1234567890), and City, State, Country (panaya test city - California - USA).</p>

Step Number	Action	Results
4.	<p>Click the Change Type Information tab, and complete the Change Type Information.</p>	 <p>Refer to the <a href="#">Change Types</a> list and descriptions on page 6 of this Job Aid.  Refer to the <a href="#">Red Amber Green</a> descriptions on page 12 of this Job Aid.  Provide as much relevant information in the Summary of change details field.</p>
5.	<p>Click the Material Information tab and complete the Material Information section.</p>	
6.	<p>Click the Dates tab and complete the dates section.</p>	
7.	<p>Click the Questions tab and complete the questions section.</p> <p>Some questions pertain to the Primary Change Type, and Some pertain to the Secondary Change Type, other questions apply to all eSCRs.</p>	

Step Number	Action	Results
8.	Click the Notes tab and enter any relevant information, including a secondary contact, in the Notes field.	
9.	Click the Save button at the bottom of the screen. This must be done before adding attachments.	
10.	A Request number is assigned. Click the OK button to continue.	
11.	Click in the Attachments field to add attachments.	
12.	Click the Browse button to search for file to attach.	

Step Number	Action	Results
13.	<p>After file is selected, click the Upload file button.</p>  <p>Repeat steps 11-13 until all files have been attached.</p>	
14.	<p>Take a moment to review the form before clicking Submit. After form is submitted, you will not be able to make any additional changes.</p>	
15.	<p>Click the Submit button.</p> 	
16.	<p>Submitted Change Requests are added to your dashboard with status Submitted.</p>  <p>By Submitting the Change Request, an email is generated to PG&amp;E’s eSCRAdmin@pge.com . The eSCR administrators monitor this mailbox for new submissions. Your submission will be processed promptly after submitted. If there are any questions, the eSCR Engineer will reach out to you.</p>	

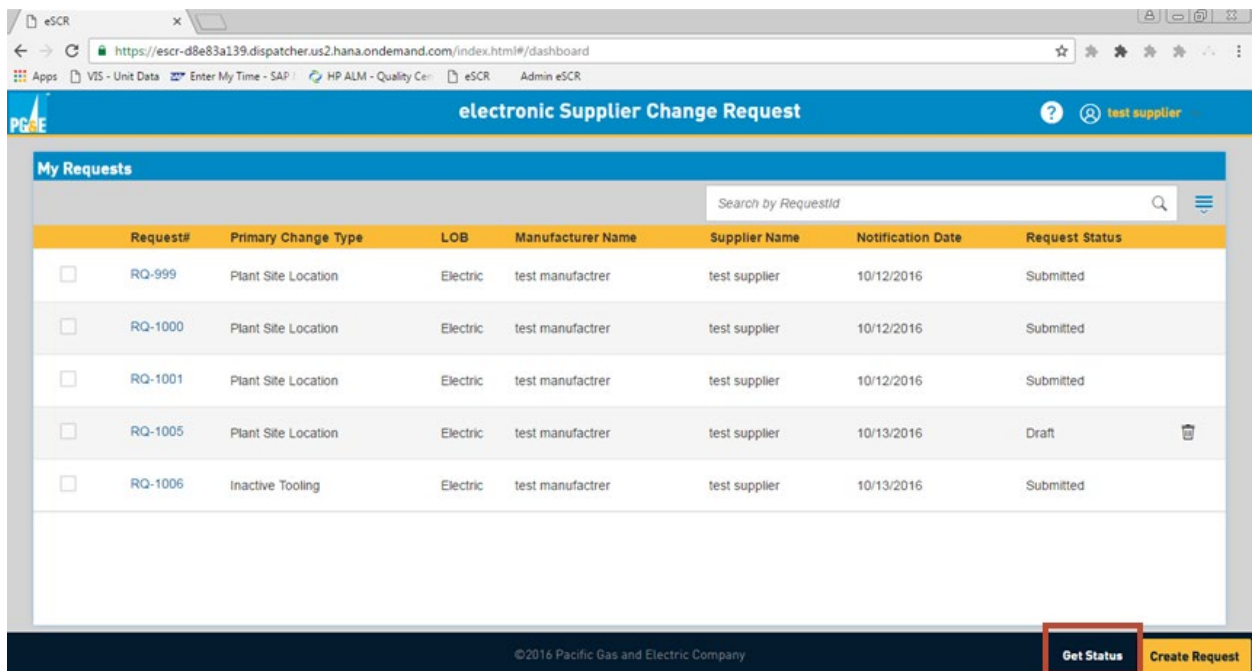
## Reading the Dashboard

Your dashboard displays the current status on each eSCR. Refer to this diagram and the status definitions.

Step Number	Status	Definition
1.	Draft	You have started to complete the Change Request form and saved it before completing and submitting. Once it is submitted, you cannot make any changes.
2.	Submitted	Your eSCR has been submitted. An email notification has been sent to your PG&E eSCR Engineer requesting his/her review.
3.	In Progress	The Change Request is in process. Your PG&E eSCR Engineer will reach out to you with questions, and to notify you of the final disposition.

## Getting Status Update

To refresh the status shown on your Supplier Dashboard, click the Get Status button, as shown below.







## Deleting Request

When a Request is saved, and not yet submitted, it shows up on your Supplier Dashboard with a Draft Request Status. Only requests in Draft status can be deleted.

To delete a Request in Draft status, click the trash can icon shown to the right side of the status as seen below:

The screenshot shows the 'electronic Supplier Change Request' dashboard. A table titled 'My Requests' contains the following data:

Request#	Primary Change Type	LOB	Manufacturer Name	Supplier Name	Notification Date	Request Status
<input type="checkbox"/> RQ-999	Plant Site Location	Electric	test manufacturer	test supplier	10/12/2016	Submitted
<input type="checkbox"/> RQ-1000	Plant Site Location	Electric	test manufacturer	test supplier	10/12/2016	Submitted
<input type="checkbox"/> RQ-1001	Plant Site Location	Electric	test manufacturer	test supplier	10/12/2016	Submitted
<input type="checkbox"/> RQ-1005	Plant Site Location	Electric	test manufacturer	test supplier	10/13/2016	Draft 
<input type="checkbox"/> RQ-1006	Inactive Tooling	Electric	test manufacturer	test supplier	10/13/2016	Submitted
<input type="checkbox"/> RQ-1009	Inactive Tooling	Electric	test manufacturer	test supplier	10/13/2016	Draft 

At the bottom of the dashboard, there are buttons for 'Get Status' and 'Create Request', and a copyright notice for ©2016 Pacific Gas and Electric Company.