TRACELINK UNIVERSITY

Batch creations

Batch creations records allow CMOs to exchange data with their Pharmaceutical Manufacturer Partners about specific lots of product they produce for the Pharmaceutical Manufacturer. Batch creation records contain the details for a lot of product (e.g. lot number, lot status, expiration date, and production date).

Create and submit batch creations

Perform this task to create and submit new batch creations. Additionally, suppliers can begin work on a batch creations and save it for completion at a later time.

Create and submit a new batch creation

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select

   Manufacturing - Supplier

   from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
4. Select

Batch Creations

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5. Select the New + New button.
6. Enter the batch number in the Batch Number field.
7. Select the Save button.

   The screen refreshes with the saved batch creation in the draft state and with the required sections populated.

8. Select the Edit Edit button.
9. In the Transaction Information section, select Submitted from the Process Status drop drown.
10. In the Batch Creations Transaction Information section fill in the following fields:
    a. Batch Number field – . The unique identifier for the batch creation. This field auto populates the value entered New Batch Creations screen.
    b. Plant Code field – The unique code to identify the manufacturing plant.
    c. Product Code field – The product code type.
    d. Product Code Value field – The product identification code.
    e. Store Location Code field – The code used to identify the storage location.
    f. Units Remaining field – The number of units in the current batch.
    g. Alternate Product Code field – The alternate code for product identification.
11. In the Manufacturer and Customer section, fill in the following fields under Manufacturer group:
    a. Company type-ahead field – The name of the manufacturer who will

produce the batch. This field pulls from the Owner's company and location master data.

The remaining Manufacturer fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owner's master data, the company name must be entered manually.

b. Party ID Type drop-down – The identifier type used for this company or location.
c. Party ID Value field – The value associated with the identifier type.

12. In the Manufacturer and Customer section, fill in the following fields under Customer group:
    a. Company type-ahead field – The name of the customer for whom the batch is created. This field pulls from the Owner's company and location master data.

       The remaining Customer fields are auto populated with the values from the company or location's master data entry. If the name of the company is not present in the Owners master data, the company name must be entered manually.

    b. Party ID Type drop-down – The identifier type used for this company or location.
    c. Party ID Value field – The value associated with the identifier type.
13. In the Batch Details section fill in the following fields:
    a. Date Manufactured field – The product manufacturing date.
    b. SLED/BBD (Shelf Life Expiration Date) field – The product's expiration date.
    c. Available from date field – The date from which the product is available for sale.
    d. Batch Status drop-down – The status of the batch.

   e. Next Inspection Date field – The date for the next batch inspection.
   f. Vendor field – The vendor who supplied the raw material for producing the batch.
   g. Vendor Batch field – The batch number of the raw material received from the vendor.
   h. Last Goods Receipt field – The date of the last goods receipt from the vendor.
14. In the Country and Lot Details section, fill in the following fields under Lot Characteristics:
   a. Batch Class field – The name of the characteristic of the batch.
   b. Batch Class Type field – The value of characteristic of the batch.
   c. In the Country of Origin section, fill in the following fields:
      i. State field – The state or region for this location.
      ii. Country drop-down – The two-letter country code for this location.
15. In the Country and Lot Details section, fill in the following fields under **Lot Attributes**:
   a. Plant Code field – The code of the plant where the batch undergoes testing.
   b. Authorization Group field – The group number where quality assurance approved the batch.
   c. Laboratory field – The name of the laboratory where the batch is tested.
   d. Description field – A brief description of the laboratory.
   e. Email field – The email address of the laboratory.
16. In the Reference Transaction Information section:
   a. Select the Add + icon. At least one reference transaction line item is required to submit a batch creation.
   b. In the Add Transaction Reference panel, fill in the following fields under Reference Transaction Information:
      i. Transaction Type field – The type of transaction.
      ii. Transaction Number type-ahead field – The unique identifier of the

transaction.

If the value does not match the available options, the value must be entered manually.

iii. Transaction Date field - The transaction date.
iv. Line Item Number field - The line item of the specified transaction that references the batch.

c. Select Apply.

The new reference transaction line item is added to the transaction reference table.

17. In the Batch Dates section, fill in the following fields:
    a. Batch Creation Date field – The date when the batch is created in the system.
    b. Best Before Date field – The date by which the product is at its peak usability.
    c. Retest Date field – The date scheduled for retesting the product.
    d. Storage Date field – The date when the product was stored.
    e. Inspection Date field – The date when the inspection was conducted.
    f. Unrestricted use Date field – The date by which the product can be used without any restrictions.
    g. Created By field – The ID of the person who submitted the batch.
    h. Created On field – The date and time when the batch is submitted in the system.
18. In the Notes section, enter any additional comments or instructions.
19. To submit the batch creation:

    To save the batch creation in a Draft state and finish it later, ensure the Move To button is not selected and then select the Save [Save] button in the draft state.

a. Select the Move To button at the top of the screen.

The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

b. Select the Save button.

The batch creation is submitted.

Tips

- Select the Add + icon, to add a new line item, where available.
- Select the Delete − icon, to remove an individual line item, where available.
- New batch creations can also be created by selecting the New + New button on the Batch Creations Details screen for an existing batch creation.

Submit a draft batch creation

Complete and submit a saved batch creation in the draft state.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select

   Manufacturing - Supplier

   from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
4. Select

Batch Creations

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5. Select the Filter Filter button to find the batch creation in Draft state.
6. Select the Batch Number link in the results table.
7. Select the Edit Edit button.
8. In the Transaction Information section, select Submitted from the Process Status drop drown.
9. Confirm the batch creation details and select the Edit icon associated with that line item to modify the fields if required.
10. Select the Move To button at the top of the screen.

    The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

11. Select the Save button.

    The batch creation is submitted.

Tips

- Select the batch number row and then select the Delete icon on the top of the Search Batch Creations screen to delete a batch creation in the draft state.

A deleted transaction cannot be retrieved.

Search and view batch creations

Search for and view batch creations

Perform this task to search for and view the details of the batch creations sent or received by customer or manufacturers. Viewing the details of a batch creations enables suppliers to quickly access order information (e.g. the quantity for each line item in an order) in TraceLink without having to search through the actual B2B message.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select Manufacturing - Customer or Manufacturing - Supplier from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.
4. Select

   Batch Creations

   .
5. Select the Filter 

 button.
6. Fill in one or more of the following fields to filter the results:

   a. State drop-down – The state of the batch creation:

      - Draft – The transaction is in the draft state.
      - Submit – The transaction has been created.
      - Processing – The application is getting ready to handle incoming transactions by doing some initial tasks, such as copying the files it receives.
      - Processed – The application changes the standard information into a

format that is easy to use and specific to your transaction.

- Preparing to Send – The application is getting ready to send out a transaction and is doing some initial tasks, like copying the necessary information for the process.
- Sending –The application sends out business transactions to the buyer or supplier.
- Sent – The transaction is successfully completed and shared with the receiving party.

b. Customer type-ahead – Displays only if the menu item is

   Sent Batch Creations

   . The name of the company the batch creation was sent to.
   If the name of the company is not present in the Owners master data then the company's name must be entered manually.

c. Manufacturer type-ahead – Displays only if the menu item is

   Received Batch Creations

   . The name of the company the batch creation was received from.
   If the name of the company is not present in the Owner's master data then the company's name must be entered manually.

d. Last Modified field – The period of time in which the batch creation was last updated:
   - Today – The transaction was modified within the last few hours.
   - Yesterday – The transaction was updated within the past 24 hours.
   - Last Week – The transaction was modified in the last 7 days.
   - Last Month – The transaction was modified in the last 30 days.
   - Last 3 Months – The transaction was modified in the last 90 days.
   - Last 6 Months – The transaction was modified in the last 180 days.
   - Custom Range – Select a specific period of time that the transaction was modified in from the calendar.

7. Select Apply.

   A list of batch creations displays based on the filter results.

8. Select the link for the batch creation from the results table.

   The View Batch Creations screen displays.

9. To view all fields for each line item, select the View icon on the

   Batch Creations

   Details screen.

Tips

- To view the details of an individual line item in the invoice, select the Viewicon for the line item in the Reference Transaction Information section on the Batch Creation Details screen.

Reprocess and resubmit batch creations

Reprocess batch creations

After the batch creations is submitted, the user might encounter an error and the processed status will be set to Paused With Error. Use the following procedure to resolve any error messages encountered while submitting a batch creation.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select

   Manufacturing - Supplier

from the left menu.
Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   Batch Creations

   .

5. Select the Filter Filter button to find the batch creations in Processing, Processed, Preparing to Send, or Sending state.
6. Select the Batch Number link in the results table.
7. View the following fields for error in the Transaction Information section:
   - Process Status - Displays the status of the submitted transaction.
   - Last Transaction Error - Displays the error message.
8. Select the Edit Edit button..
9. In the Transaction Information section, select Submitted from the Process Status drop drown.
10. Select the Save button.
    The batch creations is moved from Processing state to Sending state indicating that the batch creation transaction is submitted successfully.

Do not select the Move To button, as it will cause the transaction to skip a workflow state, preventing successful delivery.

Resubmit batch creations

If a transaction is successfully sent to a partner but an issue occurs on the partner's side (e.g. in their ERP system), the sender can avoid re-entering all the details by rolling back to a previous workflow state and resending the transaction, thus saving time and effort for both parties.

1. Select a [MPL Network] from the Network drop-down in the header.
2. Select a Team (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
3. Select

   Manufacturing - Supplier

   from the left menu.
   Partners must have the correct roles assigned if using the Owner's instance of Multienterprise Information Network Tower.

4. Select

   Batch Creations

   .

5. Select a Batch Number in Sent state.
6. Select the Edit Edit button.

   The state of the batch creation transaction is automatically moved to Sending state.

7. Select the Move To button at the top of the screen.

   The submit status indicator circle is filled in with green to indicate the desired action upon selecting save.

8. Select the Save button.

The batch creation is submitted.

The statues of the batch creation moves to Sent state.

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