API Spec Q2 Documentation Kit – American Petroleum Institute

Level 1 – Manual, Objectives and Policy	
Manual	
1.	API Spec Q2 Manual
Objectives	
1.	Quality Objectives
Policy	
1.	Quality Policy
Level 2 - Procedures	
1.	Management Review Procedure
2.	Document and Data Control Procedure
3.	Control of Records Procedure
4.	Internal Audit Procedure
5.	Training Procedure
6.	Corrective Action Procedure
7.	Control of Testing, Measuring, Monitoring and Detection Equipment (TMMDE) Procedure
8.	Risk Management Procedure
9.	Analysis of Data Procedure
10.	Customer Satisfaction Survey Procedure
11.	Purchasing Procedure
12.	Control of Non-Conforming Services / Service Related Products Procedure
13.	Identification of Service Related Products Procedure
14.	Traceability Procedure
15.	Contingency Planning Procedure
16.	Preservation Procedure
17.	Preventive Maintenance Inspection Testing Program (PMITP) Procedure
18.	Communication Procedure
19.	Control On Customer Supplied Products Procedure
20.	Management of Change Procedure
21.	Contract Review Procedure
22.	Execution of Service Procedure
23.	Service Performance Validation Procedure
24.	Service Related Products (SRP) Status Procedure
25.	Supplier Management Procedure

26.	Design and Development of Services Procedure
Level 3 – SOPs	
1.	Incoming Inspection and Testing
2.	In-Process Inspection and Testing
3.	Final Inspection and Testing
Level 4 – Formats & Templates	
Formats	
1.	Packing Report / Slip
2.	Drum / Bag / Carton Inspection Report
3.	Design and Development Planning
4.	Design Review Minutes of Meeting
5.	Design Review Report
6.	Design Change Request Form
7.	Design Change Log
8.	Service Design Calculation Sheet
9.	Breakdown History Card
10.	Preventive Maintenance Schedule
11.	Preventive Maintenance Check Points
12.	Request for Breakdown Maintenance / Preventive Maintenance / Modification of Machine
13.	Equipment History Card
14.	Daily Preventive Maintenance Check Points
15.	Order Form / Order Confirmation
16.	Customer Complaint Report
17.	Customer Feedback Form
18.	Contract Review Form
19.	Customer Property Monitoring Register
20.	Disposal of Nonconforming Products and Services
21.	Execution / Service Plan
22.	Job Card
23.	Progress Monitoring Report
24.	Planning Deviation Report
25.	Equipment Validation Report
26.	Service Report
27.	Repairing Card

28.	Installation and Commissioning Report
29.	Purchase Order
30.	Indent and Incoming Inspection Record
31.	Approved Vendor List and Annual Purchase Order
32.	Supplier Registration Form
33.	Annual Purchase Order
34.	Purchase Request Slip
35.	Vendor / Sub-Contractor Evaluation Form
36.	Supplier Assessment Report
37.	Contractor Evaluation Form
38.	Final Inspection Report for Product
39.	Sample Test Request Slip for Incoming Materials
40.	Traceability Sheet
41.	AC Motor Inspection Report
42.	DC Motor Inspection Report
43.	Gear Box Inspection Report
44.	Final Inspection Report - After Maintenance Work
45.	Clearance Report - After Maintenance Work
46.	Service Quality Plan and Its Monitoring Sheet
47.	Preventive Maintenance Plan for Critical SRP
48.	Service Performance Validation Report
49.	Service Execution Report
50.	SRP Status
51.	Gate Pass
52.	Material Issue Slip
53.	Preservation Assessment Report
54.	Goods Receipt Note
55.	Master List and Distribution List of Documents
56.	Change Note
57.	Corrective Action Report
58.	Master List of Records
59.	Quality Objectives Monitoring Sheet
60.	Audit Plan / Schedule
61.	Internal Audit Non–Conformity Report

62.	API Spec Q2, 2nd Edition Clause-Wise and Document-Wise Audit Review Report
63.	Quality Objective Plan
64.	Calibration Status of Instrument / Equipment
65.	List of Licenses / Certificates
66.	Communication Report
67.	Management Review Meeting
68.	Risk Analysis Sheet
69.	Management of Change (MOC) Form
70.	Training Calendar
71.	Employee-Wise Training and Competence Record Sheet
72.	Induction Training Report
73.	Job Description and Specification
74.	Training Report
75.	Multi-Skill Analysis
Templates	
1.	Skill Requirements
2.	Multi-Skill Requirements
3.	Disposal of Nonconforming Products
4.	Service Quality Plan – Incoming Inspection and Testing
5.	Raw Material Specification
6.	Document Identification and Codification System
7.	Department Wise Risk Analysis Sheet
Process Approach	
1.	Customer Service
2.	Dispatch
3.	Engineering
4.	Marketing
5.	Purchase
6.	Quality Control
7.	Stores
8.	Risk & Opportunity
9.	Training Activity
Service Quality Plan (SQP) Template	
Internal Audit Checklist	

Risk Assessment Sheet

API Spec Q2 - Quality Manual (2nd Edition)

Contents

DOCUMENT NO:	
REVISION NO:	
DATE OF REVISION:	
PREPARED BY:	
REVIEWED BY:	
APPROVED BY:	
SIGNATURE:	

5 Realization of Service and Service-Related Product

5.1 Contract Review

5.1.1 General

The Organization Name has established and implemented a documented procedure for reviewing requirements related to the provision of service and servicing of service-related products.

5.1.2 Determination of Requirements

In Organization Name, customer requirements are identified, including:

a. Customer-specified service and service-related product requirements, covering availability, delivery, and post-delivery activities.
b. Service-related obligations, including legal and regulatory requirements.
c. Any additional requirements identified by the company.
d. Requirements essential for the intended or specified use, regardless of whether specified by the customer.

If the customer does not provide a documented statement of requirements, the customer requirements are confirmed by our sales departments and recorded in the order confirmation sheet. Necessary records for the same are maintained accordingly.

5.1.3 Review of Requirements

Organization Name conducts reviews of requirements related to the provision of service and service-related products prior to committing to deliver the product to the customer, ensuring that:

a. Upon receiving customer inquiries regarding their requirements, they are promptly reviewed to ensure clarity and understanding of the customer's needs and whether they can be fulfilled.
b. The internal contract review, conducted as outlined in the Process Approach, evaluates the capability to provide the service and service-related products while ensuring compliance with requirements. If any disparities arise with customer specifications, they are addressed by implementing necessary changes as per the customer's requirements.

Identification of Service-Related Products Procedure

Contents

DOCUMENT NO:	
REVISION NO:	
DATE OF REVISION:	
PREPARED BY:	
REVIEWED BY:	
APPROVED BY:	
SIGNATURE:	

1 Purpose

This procedure aims to outline the steps for identifying service-related products, packing materials, and miscellaneous items stored in stores, process areas, and warehouses.

2 Scope

These covers identifying all products situated in the storage areas, production zone, and dispatch section.

3 Responsibility

3.1 **The QC Manager, Operation In-charge, and Packing In-charge** are responsible for ensuring proper product identification and traceability of service-related products within their respective areas. Supervisors and Operators support them in their day-to-day tasks.

3.2 **The Stores In-charges and Dispatch In-charge** are responsible of accurately identifying the service-related products within the Stores and Dispatch Area.

4 Description of Activity

4.1 Identification

Service-related products stored in the inventory are identified based on the parameters printed or written on their packaging or labeled affixed to them.

- Name of products,
- Batch No.
- Size, Name, Brand Name etc.
- Self-identification
- Other Precise Identification.
- Storage Condition etc.

Packing materials and spares are identified through one or more of the following means:

- Name and type of materials
- Group-wise or individual tags, labels, or stickers
- Boxes labeled with types and names of stored materials

Execution of Service Procedure

Contents

DOCUMENT NO:	
REVISION NO:	
DATE OF REVISION:	
PREPARED BY:	
REVIEWED BY:	
APPROVED BY:	
SIGNATURE:	

1 Purpose

This document outlines a procedure for conducting drilling services in compliance with specified requirements for the oil and gas industry.

This document explains the integration of processes involved in executing the service.

2 Scope

This procedure covers fulfilling service requirements for delivering drilling services to the oil and gas industry.

It details the integration of processes involved in service execution, project execution, and the verification of adherence to quality plans, procedures, and relevant standards/codes.

3 Responsibility

3.1 **The Operation Head** is responsible for consolidating the data collected during service execution and submitting it to the Management Representative.

3.2 **The Operation Manager and Engineers** are accountable for ensuring that the execution of service aligns with service quality plans, procedures, and relevant standards/codes and providing the data collected during service execution.

4 Description of Activity

- The Operation Manager obtains clearance/confirmation from the customer to proceed with the service.
- They prepare the Service Quality Plan (SQP) to execute the project according to T-SQP- 01.
- To develop the SQP, they ensure that the following documents/information/data are ready and available within the company:
  - ✓ Documentation of personnel training and competency
  - ✓ Clear contract requirements
  - ✓ Risk assessment and management for both the services and SQP
  - ✓ Information outlining the characteristics of the service and SRPs to ensure design requirements are met
  - ✓ Identification of testing, measuring, monitoring, and detection equipment

SERVICE EXECUTION REPORT		
Cust. Name:	Project Name:	
Service Details:	Location:	
Engineer Name :	Customer Representative:	
Requirement / Skill / Documents to Execute the SQP		
Checks	Status	Date
Data on personnel training and competence		
Manpower availability		
Equipment availability		
Contract requirements status		
Risk assessment and management for services		
Risk assessment and management for SQP		
Service and SRP characteristics information		
Identification of testing, measuring, monitoring, and detection equipment		
Service execution status:		
Final SQP number and date with revision number:		
Engineer: Signature	Customer: Signature	
Re-Service Execution Details		
Require changes, if any:		
Re-service execution date:		
Re-service execution report reference number:		
Final SQP no and date with revision number:		
Engineer: Signature	Customer: Signature	

<table>
<tr><th colspan="6">INTERNAL AUDIT NON–CONFORMITY REPORT</th></tr>
<tr><td colspan="3">NC Report No:</td><td colspan="3">Date:</td></tr>
<tr><td colspan="3">Department / Area:</td><td colspan="3">Document Ref:</td></tr>
<tr><td colspan="3">Auditor:</td><td colspan="3">Clause No:</td></tr>
<tr><td colspan="3">Audit Criteria:</td><td colspan="3">Control #:</td></tr>
<tr><td colspan="6">Description of Non–Conformity:</td></tr>
<tr><td colspan="6">Person Responsible:</td></tr>
<tr><td colspan="2">Date of Completion</td><td colspan="2">Planned:</td><td colspan="2">Actual:</td></tr>
<tr><td colspan="3">Auditee:

Signature</td><td colspan="3">Auditor:

Signature</td></tr>
<tr><td colspan="6">Root Cause of Non–Conformity:</td></tr>
<tr><td colspan="6">Action Taken to Resolve the Non–Conformities:</td></tr>
<tr><td colspan="6">Corrective Action Taken:</td></tr>
<tr><td colspan="3" rowspan="3">Review of Action Taken:</td><td>Status:</td><td>☐ Closed</td><td>☐ Open</td></tr>
<tr><td>Signature:</td><td colspan="2"></td></tr>
<tr><td>Date:</td><td colspan="2"></td></tr>
<tr><td colspan="2">Planned Date for Reviewing Effectiveness:</td><td colspan="4"></td></tr>
<tr><td colspan="6">Review of Effectiveness of Action Taken (Next Audit):</td></tr>
<tr><td colspan="2">Effectiveness Checked On</td><td colspan="2">Date:</td><td colspan="2">Sign:</td></tr>
</table>